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ABSTRACT

For 3 years, the teachers, administrators, board of education members, and community representatives of San Diego, California, have been working on defining, developing, and implementing restructuring plans at approximately 50 schools. This paper documents and analyzes the development of a new middle school, O'Farrell Community School: Center for Advanced Academic Studies, from January 1988 through June 1990. O'Farrell embraces restructuring principles and believes that all children can and will learn from the same high-level, college preparatory curriculum. O'Farrell will open in fall 1990 with a seventh-grade class of 350 students and will feature a new governance model, curriculum, and instruction responding to early teens' academic, social, and emotional needs. In September 1991, the school will expand to a full 6-7-8 middle school with an estimated 1,200 students. The school is divided into three "educational families" that will be offered the same interdisciplinary program during a 4-hour "core" block combining language arts, mathematics, social studies, and science. The program also includes a community service component, art, music, industrial arts, and physical education. All students will have a teacher/advocate and meet in an advocacy group daily. Emerging issues and concerns about the planning process and suggestions for future directions are discussed. (MLH)

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Restructuring : An Inside Look

The Evolution of the O'Farrell Community School: Center for Advanced Academic Studies

Paul Goren
Karen Bachofer

Planning, Research, and Evaluation Division
San Diego Unified School District

June 30, 1990

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No. 657

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SAN DIEGO CITY SCHOOLS
Planning, Research, and Evaluation Division

RESTRUCTURING: AN INSIDE LOOK
The Evolution of the O'Farrell Community School: Center for Advanced Academic Studies
June 30, 1990

SUMMARY

THE CONTEXT FOR CHANGE

For the past seven years various commissions and task forces throughout the country have called for dramatic changes in our public schools and school districts. The most recent notion of school change involves the concept of restructuring, where decision making authority shifts from centralized district headquarters to individual school sites. San Diego Unified School District has made a commitment to the restructuring concept, and for three years teachers, administrators, board of education members, and community representatives have been working on defining, developing, and implementing restructuring plans at approximately 50 schools. This paper documents and analyzes the changes occurring in the development of a new middle school, O'Farrell Community School: Center for Advanced Academic Studies, which will open in September 1990. O'Farrell embraces the principles of restructuring and strongly believes that all children can and will learn from the same high level, college preparatory curriculum.

As part of their planning efforts, the O'Farrell team members applied for and received a planning grant from the Stuart Foundations in San Francisco. They requested that part of the Stuart grant be used to provide for an observational researcher to document the team's planning and implementation process. They believed that such documentation would help them evaluate their own restructuring efforts and provide information for others who are contemplating or implementing similar change. This report is not a formal evaluation of the O'Farrell project. Rather, it is intended to provide an overview of O'Farrell's development and to identify themes and issues that might guide the team as they further examine their their restructuring process and outcomes.

Restructuring: An Inside Look documents and analyzes O'Farrell's planning efforts from January 1988 through June 22, 1990 and does not include program or policy changes that may have subsequently occurred. The central research question guiding the study is—What is Team O'Farrell's vision and how is it evolving? The team's desire to document the development of the O'Farrell dream and its encouragement of evaluator participation implies that reflection and critical analysis is an integral part of this school culture.

O'FARRELL COMMUNITY SCHOOL: CENTER FOR ADVANCED ACADEMIC STUDIES

O'Farrell Community School: Center for Advanced Academic Studies will open in the fall of 1990 with a seventh grade class of approximately 350 students and will feature a new governance model and curriculum and instruction that respond to the academic, social, and emotional needs of early teens. In September 1991 the school will expand to a full 6-7-8

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middle school with an estimated 1200 students. The school is divided into three educational families. Team O'Farrell will offer all students in each educational family the same interdisciplinary program during a four-hour "core" block combining the curriculum areas of language arts, mathematics, social studies, and science. Community service both within the school and throughout the community as well as art, music, industrial arts, and physical education will be offered during a one and one half hour "family facilitator" block each day. All students will have a teacher/advocate and meet in an advocacy group daily. Teachers in every educational family will have one and one half hours of common preparation time daily to meet with colleagues to design school curricula and make educational family decisions. The school and the San Diego County Department of Social Services have formed a partnership that includes on-site access to social service agencies and direct assistance in addressing the social and emotional needs of middle grade children. A coordinator of these services, co-funded by the school and the Department of Social Services, will be a regular member of Team O'Farrell. The central vision of the O'Farrell "Dream Team" is that all children can learn and should have access to the same high level curriculum. The team is committed to the goal, and has stated publicly in meetings and documents, that any child who spends three years at O'Farrell will be ready for any advanced-level academic program offered in any San Diego high school.

EMERGING ISSUES AND CONCERNS

Several issues and concerns have emerged during the early development of the O'Farrell Community School: Center for Advanced Academic Studies.

- O'Farrell's planning process has taken time, patience and a tolerance for ambiguity.
- O'Farrell's development has depended on the "buying of time" so team members could plan and work collaboratively.
- O'Farrell has benefitted from the interest, commitment and expertise of a wide variety of constituents.
- Team O'Farrell recognized the importance of building a strong school culture among those involved in the planning process.
- The Team O'Farrell consensus process provides the mechanism through which team members participate in decision-making and schoolwide planning.
- Even in O'Farrell's restructuring environment, leadership is desired by team members.
- Teachers assumed greater leadership roles in O'Farrell's planning retreats as the planning process evolved.
- O'Farrell's planning process revealed several issues in need of resolution and clarification.
- Even though Team O'Farrell participated in an extensive planning process, team members are concerned about whether everything will be and remain in place once school opens.

SUGGESTIONS FOR FUTURE DIRECTIONS

As O'Farrell Community School: Center for Advanced Academic Studies continues to evolve, team members may wish to consider the following suggestions that address both process and outcome issues. These suggestions are drawn from the data and analysis provided in the report.

- Team O'Farrell, whenever possible, should clearly communicate the school's vision and its program offerings to community members and parents.
- Team O'Farrell should continue to involve colleagues and consultants from elsewhere who are involved in restructuring to assist them in on-going program planning and assessment.
- Team O'Farrell may wish to use colleagues and consultants from elsewhere to help resolve any future controversial issues than can not be resolved through their consensus process.
- Team O'Farrell should use the processes already in place to respond to and meet the changing needs of the community it serves.
- Team O'Farrell should continue to use retreat settings to address new issues, revitalize the team and its mission, provide time for reflection, integrate new team members, and plan for school expansion.
- Team O'Farrell should ensure that there is a regular mechanism for communication between educational families and on-campus community service providers.
- Team O'Farrell should create a plan to assess school progress in a way that is compatible with their program.
- Team O'Farrell should consider how it will share its insights about school restructuring in other settings in the district, state, and nation.

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" ...The educational foundations of our society are presently being eroded by a rising tide of mediocrity that threatens our very future as a Nation and a people."

A Nation at Risk: The Imperative for Educational Reform
The National Commission on Excellence in Education (1983)

" There is a new consensus on the urgency of making our schools once again the engines of progress, productivity and prosperity...Without a (teaching) profession possessed of high skills, capabilities, and aspirations, any reforms will be short lived. To build such a profession— to restore the nation's cutting edge- the Task Force calls for sweeping changes in educational policy to ... restructure schools to provide a professional environment for teaching, freeing them to decide how best to meet state and local goals for children while holding them accountable for student progress."

A Nation Prepared : Teachers for the 21st Century
The Report of the Task Force on Teaching as a Profession
Carnegie Forum on Education and the Economy (1986)

"Middle grade students are unique. No other grade span encompasses such a wide range of intellectual, physical, psychological, and social development, and educators must be sensitive to the entire spectrum of these young people's capabilities. For many students the middle grades represent the last chance to develop a sense of academic purpose and personal commitment to educational goals. Those who fail at the middle level often drop out of school and may never again have the opportunity to develop to their fullest potential...The success of the educational reform movement depends on meeting the needs of middle grade students— both academically and socially. Failing to address these needs jeopardizes efforts for educational excellence and, more importantly, for these students' own future success."

Caught in the Middle, Educational Reform for Young Adolescents in California Public Schools
Bill Honig, California Superintendent of Public Instruction
California State Department of Education (1987)

"To prepare for the challenges of the 21st century, the Schools of the Future Commission calls on the city's schools and community to join together to...begin a fundamental restructuring of schools ...(and) initiate pilot 'Schools of the Future' to experiment with new approaches and organization that help all students attain productive futures."

Which Way to the Future? San Diego and its Schools at a Crossroads
San Diego City Schools, Schools of the Future Commission (1987)

"We understand that the change which leads to the restructuring of schools is complex and quite different from most change educators have discussed before. It involves fundamental questioning of traditional assumptions about the best way to organize schools for teaching and learning. It leads us to raise questions about roles and responsibilities and find new answers to them. It requires us to acknowledge that education for our students can be a lot better, and our satisfaction with helping students learn can be much higher. It demands that we demonstrate both patience and persistence."

Why Restructuring? More of the Same Will Not Be Good Enough
Thomas W. Payzant, Superintendent, San Diego City Schools (1988)

"O'Farrell Middle Level Magnet School is the first middle level magnet school in San Diego Schools whose focus and instructional program will be determined through the collaborative efforts of teachers, administrators and community. O'Farrell's vision utilizes a student-centered activity oriented learning program that includes state of the art technology and community participation and responsibility. O'Farrell is to become a 'testing ground' for the district, a restructuring demonstration school."

A Proposal to the Stuart Foundations to Increase Teacher Expertise and Involvement in Developing the O'Farrell Middle Level Magnet School
Team O'Farrell members (1989)

"Dream with me if you will...Can you see a school that children want to go to, that teachers want to go to, that parents want to go to, where teachers work closely together to provide the best education possible for all kids, where students succeed academically, where adults and children work closely together, where people smile, where the feeling is warm and the environment is safe, where decisions made about children are shared decisions, where responsibility is shared, where creativity is high, where gender and race are just part of your uniqueness and not a barrier to your learning, where there is an extended family of teacher, family, community, agency, where classrooms are exciting places to be, where teachers are turned on to teaching, where students are the number one concern...?"

Robert Stein
Team O'Farrell Chief Educational Officer
Speech notes from his files (1990)

I. DOCUMENTING CHANGE : THE EVOLUTION OF A SCHOOL

For the past seven years various commissions and task forces throughout the country have called for dramatic changes in our public schools and school districts. The most recent notion of school change involves the concept of restructuring, where decision making authority shifts from centralized district headquarters to individual school sites. San Diego Unified School District has made a commitment to the restructuring concept and for three years teachers, administrators, Board of Education members, and community representatives have been working on defining, developing, and implementing restructuring plans at approximately 50 schools. In a small office behind the nurse's room in an existing school in southeast San Diego, a new middle level school is being created, embracing the principles of restructuring and the firm belief that all children can and will learn from the same high-level, college preparatory curriculum. This paper documents and analyzes the changes occurring in the development of the O'Farrell Community School: Center for Advanced Academic Studies, a "school of the future" that will open in September 1990.

The ability to examine and reflect upon changes that are occurring is extremely valuable from an historical perspective. Documentation and analysis of a change effort can assist the process, as those closely involved can benefit from a different lens on their particular situation. As part of their planning efforts, the O'Farrell team members applied for and received a planning grant from the Stuart Foundations in San Francisco. The team requested that part of the Stuart grant provide an observational researcher to document the team's planning and implementation process for future use in their restructuring efforts. They also believed that such documentation would help inform others who are contemplating or implementing similar change efforts. This report covers the initial planning efforts for O'Farrell from January 1988 through June 22, 1990 and does not include program or policy changes that may have subsequently occurred. It is important to stress that this is not a formal evaluation of the O'Farrell project. The report's focus is to provide an overview of O'Farrell's development in order to generate themes and issues that might warrant discussion by the team as the school evolves and to guide further investigation of the process and its outcomes.

This paper is organized into five sections, including this introduction. Section II, **The Context for Change**, reviews O'Farrell's development within the larger context of educational reform at the national, state, and local levels. Section III, **Planning the**

Dream, includes a timeline documenting O'Farrell's evolution. Section IV, **The Dream Through the Observer's Lens: Notes and General Impressions from Team Meetings, Retreats, and Interviews**, provides data from the participant/observer roles and interviews. Section V, **Emerging Issues and Themes**, concludes the paper with a discussion of issues and concerns drawn from the data and suggestions for Team O'Farrell as it continues its restructuring efforts.

The planning and implementation of O'Farrell provides one model for school restructuring at the middle school level. The pages that follow document the marathon planning efforts completed over an eighteen month period resulting in O'Farrell's opening as a restructuring school. The school benefitted from the involvement and contributions of an enthusiastic and committed core of teachers, parents, community members, district administrative staff, and consultants from other restructuring schools and outside foundations. Support for O'Farrell's planning and implementation has come from several sources, including the San Diego City Schools' general fund, Federal Magnet Assistance Grants, and grants from the Stuart Foundations and the Panasonic Foundation. O'Farrell team members had the time and resources necessary to develop their vision, processes for shared decision-making, and the school's program focus. The extended planning time also contributed to the development of an O'Farrell school culture, complete with its own language and rituals. The insights gained from the experiences documented within this report, especially with respect to group process and decision making, are intended to assist those involved in restructuring the public schools in San Diego and districts nationwide.

The Language of O'Farrell

As the school's planning process progressed, an O'Farrell "language" reflecting the vision, culture, and spirit of the school evolved. New terms continue to be added to the O'Farrell vocabulary as they are needed to label and describe unique aspects of the school's program. The glossary that follows will serve to acquaint the reader with some key O'Farrell terms.

An O'Farrell Glossary

Action Captains O'Farrell Action Captains assume responsibility for guiding staff planning and decision-making efforts in areas such as school governance, curriculum and instruction, and community service. They also serve as action committee leaders, participate in retreat planning and facilitation, and provide information to staff in their area(s) of expertise.

Advocacy Daily advocacy group meetings, similar to advisory groups, enable teachers to develop individual relationships with students, provide proactive counseling and support for students, and respond to individual student needs. Teacher **advocates** maintain contact with the parents of each student in their advocacy group.

Chief Educational Officer (CEO) The Chief Educational Officer, formerly known as the school principal, assumes responsibility for O'Farrell's program and operation and serves as an advocate for both students and staff.

The Dream Team The Dream Team, also known as **Team O'Farrell**, is made up of those people (teachers, administrators, support staff, community members, parents, social service agencies) who share a belief in the O'Farrell vision and are working toward the O'Farrell "dream" of success for all students.

Educational Family An educational family consists of 132 students and an interdisciplinary team of four teachers (language arts, mathematics, science, and social studies) that is responsible for making all major decisions regarding discipline, scheduling, and curriculum and instruction.

Family Advocate The Family Advocate, funded jointly by San Diego City Schools and San Diego County Department of Social Services, counsels students and staff, coordinates community service activities, and serves as a link between the O'Farrell community and the social service agencies providing services to students and families.

Family Facilitator Teachers of subjects such as art, computers, foreign language, industrial arts, music, and physical education serve as family facilitators, working within educational families to support thematic units and expose all students to their content areas.

Humanities A comprehensive curriculum area that integrates the subjects of language arts, social studies, and philosophy.

Team Closing Every Team O'Farrell gathering ends with the traditional team closing. Team members stand in a large circle and clasp hands as each person present shares positive comments, successes, or thank yous with the rest of the group. The closing helps keep the O'Farrell team's dream focused and alive.

Team O'Farrell The Dream Team, also known as **The Dream Team**, is made up of those people (teachers, administrators, support staff, community members, parents, social service agencies) who share a belief in the O'Farrell vision and are working toward the O'Farrell "dream" of success for all students.

Technics A comprehensive curriculum area that integrates the subjects of mathematics, science, and computers.

O'Farrell's Program and Interdisciplinary Core

O'Farrell will open in the fall of 1990 with a seventh grade class of approximately 350 students and will feature a new governance model and curriculum and instruction that respond to the academic, social, and emotional needs of early teens. In September 1991, the school will expand to a full 6-7-8 middle school with an estimated 1200 students. For the past 18 months, educators and community members have been actively involved in designing this new school. The central vision of the O'Farrell "Dream Team" is that all children can learn and should have access to the same high level curriculum. The team is committed to the goal, and has stated publicly in meetings and documents, that any child who spends three years at O'Farrell will be ready for any advanced level academic program offered in any San Diego high school. They will address the equally important social and emotional needs of all students enrolled, and develop a sense of commitment to community and community service.

Team O'Farrell will offer all students the same interdisciplinary program during a four hour "core" block combining the curriculum areas of language arts, mathematics, social studies and science. The school is divided into three educational families that will have a student to teacher ratio of 22:1. Community service both within the school and throughout the community as well as art, music, industrial arts, and physical education will be offered during a one and one half hour "family facilitator" block each day. All students will have a teacher/advocate and

meet in an advocacy group daily. All teachers will have one and one half hours of common preparation time daily to meet with their colleagues to design school curricula and make educational family and school decisions. The school and the San Diego County Department of Social Services have formed a partnership that includes on-site access to social service agencies and direct assistance in addressing the social and emotional needs of middle grade children. A coordinator of these services, the Family Advocate, co-funded by the school and the Department of Social Services, will be a regular member of Team O'Farrell.

Report Methodology

The purpose of this paper is to document and analyze the O'Farrell planning efforts to date. This covers activities that occurred between January 1988 and June 22, 1990. The central research question guiding this study is— What is Team O'Farrell's vision, and how is it evolving? Although the authors of this report have been referred to as the team "ethnographers," it is more accurate to state that the report depends on a variety of qualitative methodological techniques. These techniques include participation/observation in three weekend planning retreats and all team meetings since March 1990, a semi-structured interview of several team members, and document review. The participant/observer role is an important aspect of the study and the overall tone of this report. The O'Farrell team expected the participant/observers to engage actively in all team meetings and retreats as both team members and documentarians. As participants in the planning process, the authors also provided technical assistance to the team from the perspective of the school district's Planning, Research, and Evaluation Division. The team's desire to document the development of the O'Farrell dream and its encouragement of evaluator participation implies that reflection and critical analysis is an integral part of this school culture.

The authors of this paper bring together different perspectives and experiences in education as their lens on O'Farrell's evolution. Paul Goren has spent 12 years in education as a teacher, policy analyst and researcher. Goren is a former seventh and eighth grade social studies and mathematics teacher. He served for three years as an educational researcher and policy analyst in San Diego's Planning, Research, and Evaluation Division, focusing on school program and facility planning, educational research, and qualitative studies of the district as an organization. He is currently working on the final phase of his dissertation as a doctoral candidate in Administration and Policy Analysis at the Stanford University School of Education. Karen Bachofer spent the last four years as an elementary school teacher in San Diego Unified after teaching adult special education in Indiana. She served as the restructuring chair at her school, focusing on developing site-based management and integrating a new interdisciplinary curriculum. She is currently a resource teacher in the Evaluation Department assigned to projects such as the Correia Interdisciplinary Institute, the district K-6 Science Evaluation, the Learning Styles studies, and the Restructuring/ Technical Assistance committee. Bachofer is also enrolled as a student in the Joint Doctoral Program at San Diego State University and the Claremont Graduate School.

II. THE CONTEXT FOR CHANGE

The evolution of the O'Farrell Community School: Center for Advanced Academic Studies reflects much of the increased national, state, and local interest in the condition and quality of our public schools over the past seven years. The 1983 report, **A Nation at Risk**, marked the beginning of this most recent reform effort with the statement that the "educational foundations of our society are ...being eroded by a rising tide of mediocrity." This report was followed in the next few years by numerous national, state, and local papers, panels, and commissions identifying the ills of our educational system and possible

cures. One solution to the problems facing the schools involved a call from the Task Force on Teaching as a Profession of the Carnegie Forum on Education and the Economy to "restructure" schools, giving teachers a greater say than they have had in the past in the areas of learning, achievement and school operation.

The San Diego City Schools echoed the Carnegie recommendations when its own Schools of the Future Commission published its report **Which Way to the Future, San Diego and its Schools at a Crossroads** in late 1987. The commission recommended restructuring as a district goal and the initiation of pilot "schools of the future" that would experiment with new pedagogical techniques and school organizational structures. During the past three years, close to 40 schools have been actively involved in restructuring efforts supported by the district, its Board of Education, the Stuart Foundations of San Francisco and the Panasonic (formerly Matsushita) Foundation of Secaucus, New Jersey.

There are several themes that are central to the restructuring effort as suggested by the Schools of the Future Commission and San Diego City Schools superintendent Tom Payzant. The general principles guiding restructuring and the design of pilot "Schools of the Future" include:

- Empowering individual schools to determine how best to teach students, within clear expectations set by the superintendent and the board of education,
- Encouraging principals and teachers to work together in managing schools and the learning process,
- Allocating resources, incentives, and recognition to enhance school-based authority and the retention of good teachers in the classroom,
- Using diverse teaching approaches and curricula to respond to the diverse learning needs of students, and
- Providing more rigorous school-based accountability— with fair, equitable and objective methods to evaluate school performance— in return for more school-based authority.

While the Schools of the Futures Commission was recommending changes for the San Diego City Schools, a state level Middle Grade Task Force was addressing the needs of children in grades 6, 7 and 8. Their 1987 report, **Caught in the Middle, Educational Reform for Young Adolescents in California Public Schools**, recognized that in order to meet high academic standards, schools must also meet the social and emotional needs of middle grade students. This task force recommended that all middle level children pursue a common academically-oriented core curriculum based on a variety of learning strategies and incorporating various study skills. They also noted that each middle level student should have, upon completion of middle school, access to the broadest range of academic options in high school. The task force report emphasizes the importance of creating middle school environments that are structured to address the academic, social, emotional, and physical characteristics of middle level students through innovative curricula and teaching practices, new school organizational structures, and alternative methods of student assessment and accountability.

In January of 1987, Superintendent Payzant and his staff presented the district's first Long-Range Facilities Master Plan (LRFMP) to the Board of Education. The LRFMP provided solution strategies to the projected enrollment growth in the city schools that would exceed

the operating capacities of existing school buildings. One of the solutions to this problem involved moving the School for Creative and Performing Arts out of the O'Farrell building to a new school building in the same community and reopening the O'Farrell site as a junior high/middle school by September 1990.

This particular solution left school planners with the opportunity to design and implement a new school program at the O'Farrell school site, shifting away from set district traditions and procedures regarding the nature of school. Assistant Superintendent Beverly Foster from School Operations Division, working with Assistant Superintendent George Frey of Community Relations and Integration Services, the Superintendent's cabinet, and the San Diego Teachers' and Administrators' Associations envisioned the initial concepts and themes for the school. The restructuring efforts in the district and the statewide initiative towards middle level education helped them formulate suggested approaches for the new school.

In addition, the district's close association with the Stuart Foundations and the Panasonic Foundation and its consultants helped influence O'Farrell's early development. The Stuart Foundations provided the resources for a week-long planning session in August 1989 for newly appointed team members. They also supported three planning retreats and five major trips for team members to other innovative school programs during the 1989-90 school year, as well as co-funding this report. The Panasonic Foundation has provided both technical assistance and resources to school restructuring efforts in districts across the country. They have served as a resource to the San Diego City Schools' own restructuring efforts by linking the district to teachers, administrators, and educational consultants involved in planning and implementing educational change efforts nationwide. They have been influential in the initial planning of O'Farrell and in providing consultants to assist in the strategic planning sessions for the team over the last year.

III. PLANNING THE DREAM

Planning for the O'Farrell Community School: Center for Advanced Academic Studies has occurred for more than two and one half years. It has involved O'Farrell team members, central office staff, educational consultants, members of the community at-large, and social-service providers from throughout San Diego County. This section of the report provides an overview of the planning activities that have occurred to prepare for the opening of school in September 1990.

- **January 1988** — The district's Long-Range Facilities Master Plan recommended the relocation of the School of Creative and Performing Arts to a new facility, vacating the O'Farrell school site. District planners started discussing the possibility of re-opening O'Farrell as a neighborhood middle level restructuring school.

- **Spring 1988** — Representatives from the County of San Diego and its departments of Health Services, Probation, and Social Services, and San Diego City Schools, the City of San Diego, and the San Diego Community College District initiated discussions about coordinating human and social services for their common clients. The "New Beginnings" project emerged from these discussions with the intent of developing a "one-stop health and human services shop" at or near one San Diego City Schools' elementary school. This project established the initial relationships that led to the close partnership between the Department of Social Services and the new O'Farrell.

- **June 1988** — Voters approved Proposition Y funding for the building of a new School for Creative and Performing Arts (SCPA). The passage of the proposition confirmed SCPA's relocation and necessitated the development of a new program at O'Farrell.

- **October - November 1988** — Members of the Superintendent's Cabinet and representatives from the Panasonic Foundation, the San Diego Teachers' Association and the San Diego Administrators' Association began discussions on the O'Farrell reopening.

- **December 1988** — The Board of Education approved the O'Farrell Junior high School restructuring proposal written by Beverly Foster, Assistant Superintendent for School Operations Area III. The proposal stated specifically where the support for the new school concept originated and provided a timeline for planning and program implementation. The proposal noted the following.

  " The Board of Education and district leadership are supportive of school restructuring as a means to improving the quality of instruction and increasing student achievement. A major focus of school restructuring is greater site autonomy and shared decision making among staff, students, and parents. School Operations Division, Area III is interested in establishing a process for the community and staff to design the O'Farrell school program including a vision statement, establishing goals and objectives, determining the governing structure, and recommending the magnet emphasis. Representatives from the Matsushita (now Panasonic) *Foundation have expressed an interest in working collaboratively with the district, site, and community for the reopening of O'Farrell. The assistant superintendent of Community Relations and Integration Services has indicated a willingness to work closely with a team representing the new O'Farrell staff and community to determine the unique features of the magnet program at the school."*

- **January - February 1989** — The district announced and filled the principal's position. The commitment to school restructuring and change was prominent in the job announcement. The principal's job announcement stated that:

  "... O'Farrell Junior High School will operate as a 'restructuring' school embracing the philosophy of staff, student, and community involvement in planning and implementing the governance, organization, and curriculum of the school."

Selection criteria for the new principal included:

"Knowledge of, and a commitment to, the process of restructuring with emphasis on shared decision making in all matters including budget, school organization and governance, and student guidance."

Dr. Robert Stein assumed the O'Farrell principalship in February 1989, following a promotion from his previous position as a secondary vice principal in the district.

- **March - June 1989** — O'Farrell's principal and the district announced and filled the initial seven teaching positions. The announcement for teacher vacancies, with an application deadline of April 26, 1989, stated that:

  "Applicants must have a strong commitment to shared decision making, collaborating, and participating in a restructuring school environment. Selected school staff will participate in extended school year activities (July 1989 - July 1990) to plan the governance, structure, school organization, magnet emphasis, and curriculum of this new middle level school. School site planning will occur one week during the summer of 1989 and at various times throughout the 1989-90 school year, for which staff will receive monetary compensation."

In addition the job announcement provided the following background information about the school to prospective candidates. O'Farrell's magnet focus was developed by teachers, school staff, parents, and community representatives.

"O'Farrell Middle Level Magnet School will emphasize the use of a variety of strategies and procedures that promote effective classroom instruction, i.e., cooperative learning, team teaching, the Socratic method of questioning, flexible scheduling, and an interdisciplinary approach to teaching. The staff will be expected to hold and convey high expectations for student achievement and student behavior and to work toward developing strong links to the community."

- **April 1989** — Team O'Farrell received a grant from the Stuart Foundations to help fund the summer strategic planning workshop for teachers, administrative staff, central office, and community representatives. Consultants from the Panasonic Foundation worked closely with team members and district officials in planning the workshop.

- **April 1989** — Team O'Farrell received a request for proposals from the Stuart Foundations for projects that encourage teacher participation in decision-making.

- **July 1989** — Four Team O'Farrell members attended the Correia Summer Interdisciplinary Curriculum Writing Institute, sponsored by the Panasonic Foundation and the district. Participants met with experts involved in interdisciplinary curricula and worked together to design interdisciplinary teaching units.

- **August 3 - 9, 1989** — All team members attended a week-long planning workshop. The planning week addressed the social, physical, psychological, and intellectual needs of middle level children, the proposed family structure, and the organization of the school and its community council.

Presenters and participants included Team O'Farrell staff, Superintendent Tom Payzant, representatives from the Cleveland Humanities Magnet in Los Angeles, Dennis Gray from the Council for Basic Education in Washington, D.C., Michael Holzman from the Panasonic Foundation, Ted Lobman from the Stuart Foundations, Myles Myers, president of the California Federation of Teachers, and Jean Slattery from the Rochester, N.Y. public schools.

Community participants included several parents, Jacqueline Jackson from the

San Diego Urban League, Jake Jacobsen, director of the San Diego County Department of Social Services, Rena Robinson from the Probation Department, Georgia Tate from the Department of Social Services, and Raymond Uzeta from the Chicano Federation of San Diego County.

The funding for the planning project was split three ways. The Stuart Foundations and Panasonic Foundation provided $7100 and $3500 respectively, while San Diego Unified provided approximately $2000 of in-kind services.

- **August 1989** — Excerpts from ***The Team O'Farrell Interdisciplinary Rap***, lyrics by O'Farrell teacher Sandra Woodruff.

Okay, here is the situation,
It all starts out in the school location,
The kids come in, the schedule begins,
The same every day, with no exception!
History period one, music period two,
Then science, English and algebra too.
From class to class in boring rotation,
Never taught subject integration!
The kids tune out, their minds go blank
This is the depth to which learning sank!

We're just here to stay,
We think we've got a way,
We're just here to quip,
We can help raise that ship,
We're just here to stand up and brag,
Interdisciplinary is our bag!
I'm Kathy, I'm Lenora, I'm Sandra, I'm Jo,
Kids are tops, Bob's our pops,
Let's build a school that really hops,
Let's build a place with minds aglow,
Where students, teachers, and community grow!

We can bridge that curriculum gap,
After all, we wrote this rap!
When the human agenda was begun,
The body of knowledge was singular, one!
Only man in his endeavor,
To make learning better,
Divided the curriculum,
Let's cross those rigid lines,
To improve our children's minds.
Let's teach essential skills,
Like thinking and solving, and
Why the world's revolving...

...Interdisciplinary is the word,
This last thought we want to be heard.
By blending knowledge into a cohesive whole,
We can encourage young minds to grow.
So let's get going and let's make haste,
Because a mind is a terrible thing to waste!

- **September - November 1989** — Team members developed and submitted grant proposal to the Stuart Foundations for $41,000. These resources were earmarked to fund three Team O'Farrell planning retreats devoted to school structure and governance, the social-emotional component of the school, and O'Farrell's team teaching and interdisciplinary instruction component. Team members also requested resources to fund documentation of O'Farrell's planning and initial implementation. The Stuart Foundations awarded O'Farrell $41,000 on January 5, 1990.

- **October 1, 5 and 7, 1989** — During the first week in October, the team held planning seminars on a Sunday, Thursday and Saturday. These seminars resulted in the selection of a school name, further definition of the school vision and mission, a proposed magnet concept, and delineation of the key characteristics of an educational family unit.

Team O'Farrell's Vision

We believe:

All students, when given the opportunity to learn through active participation, can succeed academically.

All students should receive the highest levels of academic education.

All middle level students need to develop high standards of appropriate behavior.

Fine and practical arts education enhances academic learning for the middle level student.

The middle level student needs to learn his or her role as a citizen in a global society.

The school is responsible for providing the highest levels of curriculum in a variety of ways to learners.

Students learn best in cooperative relationships.

The school is a place that should be sensitive to the needs of both children and adults.

Successful, responsible students breed successful, responsible adults.

The school is an extension of the child's family and community.

The school has a responsibility to address the academic, social, physical, and psychological needs of students.

It is to the advantage of the learner to learn in a multiracial/ethnic environment.

It is academically advantageous to participate in cross-curricular studies.

Parents, teachers, and community agencies must share in the educational decision-making process.

The school must extend learning experiences beyond the school site/day.

The school environment must nurture the teacher as learner and researcher.

O'Farrell's Mission Statement

"The O'Farrell Community School: Center for Advanced Academic Studies will promote excellence by providing all middle level students a single, academically enriched curriculum within a multiethnic, student-centered environment. The mission of the school is to attend to the social, intellectual, psychological, and physical needs of middle level youth so they will become responsible, literate, thinking, and contributing citizens."

- **November 1989 - June 1990** — The team held meetings once or twice a month at the home of team member Diana Breidenstein to coordinate activities, planning efforts, and general school business. Meetings occurred after the regular school day from 4:00 until 6:00 (and often later) and were attended by O'Farrell staff, parents, and community members.

- **November 1989 - June 1990** — Team members, usually in groups of five, visited other programs nationwide to see how different reform models worked and to join the network of educators working to restructure the public schools. Team members visited their colleagues in the Rochester Public Schools, Capshaw Middle School in Santa Fe, New Mexico, Central Park East in New York City, and the Cleveland Humanities Project (Humanitas) in Los Angeles. In addition, Chief Educational Officer Bob Stein and O'Farrell teacher Byron King met with Ted Sizer, dean of the School of Education at Brown University in Providence, Rhode Island and head of the Coalition for Essential Schools. The Stuart Foundation grant supported these activities.

- **November 1989 - June 1990** — Bob Stein continued on-going discussions with Georgia Tate and Jake Jacobsen from the San Diego County Department of Social Services in order to confirm commitment and partnership relationship.

- **January 15, 1990** — A letter from Bob Stein to the team...

  Dear Team O'Farrell,

  As we move forward with our magnet proposal and the development of our concept, I wanted to thank each and every one of you for the creative and hard work you have already put forth. There are times when the work gets frustrating, especially when we are not the final decision makers on some issues, yet, you stay positive and flexible. I am ever aware that many of you are still working hard in your present positions and that our planning sessions are above and beyond the normal work day.

  ...There is much more to do. It is now that we must put detail into the dream. Our educational families need to be explained and operationalized, our interdisciplinary curriculum needs to be developed, our guidance piece needs development, our governance structure needs to be outlined, our community service piece needs to be worked on, and so on and so on ... I'd better stop or I'll wear down just listing the work to be done. Yet, it will be done and it will be done well because of people like you. You are incredible and your energy should be an example to all. I am so happy that all of you have been a part of the dream team. Keep up the spirit and the great work. Keep each other up. Our time is coming.

- **March 1990 - June 1990** — Team O'Farrell initiated discussion with Cox Cable and the Los Angeles Times/San Diego Edition about the possibility of forming a partnership relationship with the school.

- **March 8, 1990** — Team O'Farrell hosted a recruitment reception where prospective team members had the opportunity to meet with team members to discuss the school and its vision. Assistant Superintendent Beverly Foster hosted the reception.

- **March 15, 1990** — The Community Action Partnership Office of the San Diego Department of Social Services held a planning meeting for community social service agencies and Team O'Farrell members.

- **March 20, 1990** — San Diego City Schools' Board of Education approved the magnet proposal for O'Farrell in which the team recommended the center for advanced academic studies concept. O'Farrell received $211,000 for the 1989-1990 planning year from a Federal Magnet Assistance Grant, and was awarded $311,000 from the same source for the 1990-1991 year.

- **March 22 - 24, 1990** — Team O'Farrell members coordinated and participated in a weekend planning retreat at the Whispering Palms Country Club in Rancho Santa Fe, California. This retreat resulted in the development of a governance model and the family structure for the school.

- **April 19, 1990** — Team O'Farrell members attended a mini-conference on educational technology and its possible use at O'Farrell. The all day conference included formal presentations from computer vendors to all team members. The afternoon session involved a discussion on the strengths and weaknesses of the presentations and the use of technology in the classroom with San Diego State University educational technology professors Allison Rossett, Pat Harrison, and Bernie Dodge.

- **April - June, 1990** — Thirteen new staff join the O'Farrell team in several waves between April and June. Parents, community agency representatives, the CEO, and existing teachers participated in the interview and selection process.

- **May 4 - 5, 1990** — Team O'Farrell members coordinated and participated in a weekend planning retreat at the Kings Inn in San Diego. This retreat resulted in the development of the social/emotional support and community service components for the school.

- **June 1 - 2, 1990** — Team O'Farrell members coordinated and attended a weekend planning retreat at the Whispering Palms Country Club in Rancho Santa Fe, California. This retreat provided team members with a model for interdisciplinary teaching and learning within the family structure, and discussion on student assessment.

- **June 12, 1990** — What follows are portions of a memorandum from Gloria Mosi, Team O'Farrell member, community member, and parent of a future O'Farrell student.

To : Team O'Farrell
From: Gloria Mosi -- Parent

"I have been a member of Team O'Farrell since March. I have been to several team meetings and two retreats. I must admit I do feel that I am part of the Dream Team. And I, too, would like our dream to become reality. Please read some of my thoughts and use them as 'food for thought.' I am not sure which of our planning meetings I will be able to attend. I do know that my daughter and approximately 399 other children will be attending our school in September and we want to be ready to welcome them.

Link the socio-emotional piece with the curriculum. Teachers seem to have different levels of commitment when it comes to the quantity and quality of individual assessment...Where is the time going to be scheduled for teachers to assess our children individually? We don't want to have children floating around because we are focusing on low achievers, children with social problems, and/or high achievers. When we build a system based on two extremes the majority of the children who fall in-between tend to be left out. We must assess and analyze each student equally...

There is definitely a bridge between what parents want and need from teachers and what teachers want to include parents in. I think that teachers many times under-estimate parents and their ability to comprehend. Even though I truly believe that Team O'Farrell is progressing, I feel we need to continuously link our meetings and retreats together. For example, while discussing assessment and grading some teachers did not want to include the socio-emotional aspect. Some said that we weren't discussing that portion at this time. I feel that how you grade and assess children is linked to the way you see that student as an individual. That is why I think that a teacher can be an advocate and teacher for the same student...

I think we are asking a lot of the teachers, so I strongly suggest individual consultations with the teachers (advocates) to find out what they believe is their responsibility to the family, children, parent, and community. To the teachers, I suggest that you be as open and honest as possible. Say what you feel and commit only to what you believe you are capable of doing...

...I think we are putting a lot of focus on what our children can do for the community. The number one thing our children can do for the community is to be the best that they can be. The community needs thinkers, and leaders. They need adults who can make decisions and speak out for the needs of the community. We intend to produce children who are thinkers. What the community should do is provide them with a learning environment that will enable them to be contributing adults. I feel that once or twice a week is enough time for them to concentrate on working with the community...

- **June 22 - July 13, 1990 —** Team O'Farrell members will participate in a three week (120 hour) planning session to design interdisciplinary curricula, determine actual educational families, and tie up loose ends from previous retreats and team meetings. Several presentations are planned including training for all team members on district administrative responsibilities, technology applications in the classroom, and the use of polycentric, multitcultural curricula.

IV. THE DREAM THROUGH THE OBSERVERS' LENS:
Notes and General Impressions from Team Meetings, Retreats, and Interviews

As participant/observers, Goren and Bachofer spent five months working closely with Team O'Farrell in all common team activities. The team asked us to become involved as participants and to offer suggestions and thoughts regularly in retreats and team meetings. They also asked us to take the role of observer, to document what was evolving, and to comment on that process from our perspective. They gave us the opportunity to be both the "artist" involved in a work in progress and "critic" who could step back and provide commentary on what was being created. The perspectives that follow reflect our attendance at all team meetings and the three planning retreats, interviews we conducted with team members, and extensive document review.

Team Meetings: November 1989 - June 1990

Since November 1989, O'Farrell team meetings have been held at the Allied Gardens home of Diana Breidenstein, the school librarian. Every second or third Monday afternoon at 4:00 p.m., teachers, support staff, parents, and community members gathered on Diana's closed-in back porch to discuss the development of the school. The team met new team members, planned for upcoming retreats, received updated information on O'Farrell developments, heard reports on trips taken by team members, and made planning decisions related to O'Farrell's staffing, funding, and operation. In addition to the decision-making and general planning advantages of regular team contact the meetings served several purposes. First, they provided opportunities for team members to establish the necessary working relationships for the extensive year-long planning effort. Second, they contributed to the development of a "family" feeling that encouraged and supported team members as they worked to develop O'Farrell's dream. And third, they offered parents, teachers, and community members the opportunity to discuss shared concerns and plan toward a common goal. The context and content of O'Farrell's team meetings are described in the narrative that follows. The high level of enthusiasm and spirit that Team O'Farrell brought to these gatherings, however, are difficult to communicate.

Chief Educational Officer Bob Stein usually chaired the team meetings, but other team members were often responsible for some portion of the business conducted. The team decided to work from a time-certain agenda because of the limited time available and because almost all team members still had job responsibilities elsewhere. As the discussion on each item began, a large kitchen timer was used to time the number of minutes allowed for that item. Although the loud bell was occasionally ignored, this technique worked very well and meetings usually adjourned at around 6:00 p.m. Treats were often shared during the ten minute break midway th[illegible]gh the agenda and on many occasions team celebrations (of a team member's birthda[illegible]n the Day of the Teacher, or Bosses' Day) occurred.

Team O'Farrell members came to meetings expecting to contribute, and they seldom missed these sessions. Discussion was usually interesting and lively, and humor played an important role in the meetings. *"Let me know if you need a vegetarian meal at the next retreat,"* said Bob at one team meeting, *"United Airlines will be providing those."* Unlike many teachers' meetings that we have attended in "typical" schools, team members seemed to pay attention in meetings. There were few, if any, private conversations held during team discussions, no one graded papers, and no one "cat napped."

Some of the most critical decisions effecting the technology component of the O'Farrell plan took place at team meetings. During the course of the year, the team members met

with computer vendors, observed students using various computer systems, previewed software and systems, and discussed the role that technology should play at O'Farrell. The technology action committee and the team then worked together to shape the technology plan for the school. As stated in the O'Farrell Magnet Proposal, state-of-the-art technology will be an important part of the school program. The committee and team did not want to fall into the "computer baby-sitting" trap, however, and continually stressed the importance of the student-teacher relationship. The team believed that technology should compliment and enrich the educational program at O'Farrell, and that technology for technology's sake should not be tolerated.

At one team meeting late in May, the technology action committee recommended against purchasing any additional educational software systems. When a parent asked if any other schools were using these systems, the committee responded that they were, but that from their experience the kids got bored on those systems in less than a day. The team had a computer lab from Apple on campus and software available for instruction, and so decided to be conservative in its investment in any computer-aided instruction packages. Bob reminded the group that, *"If we accept this recommendation, we will open O'Farrell with the technology that we now have."* The team agreed, and additional software was not purchased.

A number of outside observers and consultants attended team meetings during the year. Some were invited so that they could provide information that the team needed for decision making or planning purposes, and some were simply interested in seeing what the team was "up to." All were welcomed with a "we need all the help we can get" attitude. The team solicited advice from: Dr. Ian Pumpian San Diego State University on the needs of special education students; Tim Allen, Director of the Second Language Department on the needs of second language students; Bill McClain, a former middle level principal who once opened a district middle school; Fred Becker from Point Loma High School on effective living practices for teenagers; and Stacy Burke and Sandra Murphy from Cox Cable on a possible partnership agreement.

Every Team O'Farrell gathering ends with a traditional "closing." Team members form a circle by clasping hands, and those who wish may voice comments, thank yous, welcomes, or observations. The closing is used by team members to reflect on what they are involved in, to share feelings, and to recognize that all involved are involved together. Bob is known to share his dream of the school in this setting, and does so to remind participants that they can and will improve the educational opportunities for all students.

The Planning Retreats

Team O'Farrell both planned and participated in three weekend planning retreats between March and June 1990. These retreats addressed school governance and structure, social-emotional needs of students and community service, and team teaching and the interdisciplinary curriculum. The pages that follow describe the retreats in detail, focusing both on the content and the process of these weekend planning sessions. A retreat planning group, headed by an action captain, planned and facilitated each retreat. Action captains and their retreat planning groups entered these weekends with sufficient structure to start activities and the flexibility to change as the weekend progressed. Each retreat planning group spent time in advance to prepare agendas and materials for the retreat. The planning groups also met during the course of their retreat, using free time and late evenings to revise and change agendas and activities responding to the entire team's needs as they evolved.

Over the three retreats, several process issues related to decision making and the roles of individuals as decision makers evolved. As a restructuring school, the O'Farrell team had made a commitment to shared decision making. Decisions at O'Farrell were to be made by consensus with the active participation of teachers, staff, and community members. The retreats provided the opportunity for the consensus decision process to evolve and for team members to have experience with it. Through the consensus process, new roles for individuals emerged. Teachers, parents, community members, and school administrators found themselves in new situations. Some individuals assumed more responsibility for school decisions; others had to adjust to having less or different responsibilities. Almost all had to learn how to listen and recognize that what their colleague was saying, regardless of his or her role and title, was important in order to reach consensus. Although team members had read about shared decision making and, in principle, supported it they had not all been in a situation where it was actually practiced. The retreats provided the opportunity for this to occur and for the process to mature.

Retreat I
School Governance and Structure
March 23 - 25, 1990, Whispering Palms

On the Monday prior to the first retreat the team met at Diana Breidenstein's house to discuss general business and the plans for the upcoming weekend. There was some tension in the room and much distraction. It was that time of the school year just before spring break when both teachers and students were in need of rest. The previous weekend there had been a tragedy involving some district employees that had its impact on people in the room. The retreat was several days away and the team knew that it was close to decision-making time on school governance and structure. The actual plans and agenda for the retreat were not clear when the meeting ended. It was like a final dress rehearsal for a play scheduled to open the next night. The tensions were present because the expectations were high; "opening night" was as far away as September, yet this component of the production had to be staged no later than the following Sunday morning. The team closing was rushed, and team members had difficulty focusing on what was being said.

The retreat was set at the Whispering Palms Country Club just north of San Diego in Rancho Santa Fe. Whispering Palms is a golf and tennis resort that has a two story unit with hotel rooms overlooking the swimming pool and one of the golf courses. Retreat participants assembled in the conference room near the hotel rooms at 5:00 p.m. on Friday evening after a full day at work. Included with the team members were Luis Villegas from the Area III School Operations office, Jacqueline Jackson from San Diego Urban League, Michael Holtzman from the Panasonic Foundation, and Steve Dilg and Lorna Arisa from Capshaw Middle School in Santa Fe, New Mexico, a school with a structure similar to the preliminary proposals for O'Farrell. The invited consultants from Capshaw and Panasonic, and the community representative from the Urban League served as resources and equal participants, sharing their knowledge and expertise through the weekend sessions.

CEO Bob Stein opened with a welcome and an overview of how the weekend was organized. The goals for the retreat were:

- To build team spirit,
- To build and improve communication, and
- To reach consensus on family structure and school governance.

Friday night's session included team building activities and an overview of the school's enrollment and staffing allocations. On Saturday the team would work to define educational families, and address staffing and decision-making issues within the families and in the school. Bob stressed that there would also be free time for relaxing, so that all could enjoy the beautiful setting. Bob's comments and the organization of the weekend indicated that the "dress rehearsal" tension from the team meeting the previous Monday had been recognized and addressed by the retreat planners in time for the "opening" of this first retreat.

Prior to dinner, from 5:30 until 6:30 p.m., participants did some team building exercises so that team members and retreat participants could get to know each other. Team members were asked to write down their expectations for the weekends on butcher paper hanging on the wall. Participants' expectations included the following:

- Who is in a family?
- What is the overall governance structure?
- Team building.
- Governance to perpetuate dreams.
- To feel like a member of the team.
- Reaffirm the spirit.
- Clarify O'Farrell's structure.

After dinner, Randy Conry, Byron King and Bob Stein reviewed what "is" about O'Farrell. They focused, during the first part of the evening session, on information about the children and the formula allocations for teachers provided by the district . Their intent was to provide as much background information as possible so that the team members in the room could make informed decisions throughout the weekend. Bob was careful to stress throughout the evening that team members should not feel constrained to make decisions based on past district precedent or tradition when he said,*"Let's forget what we can't do, and plan what we can."*

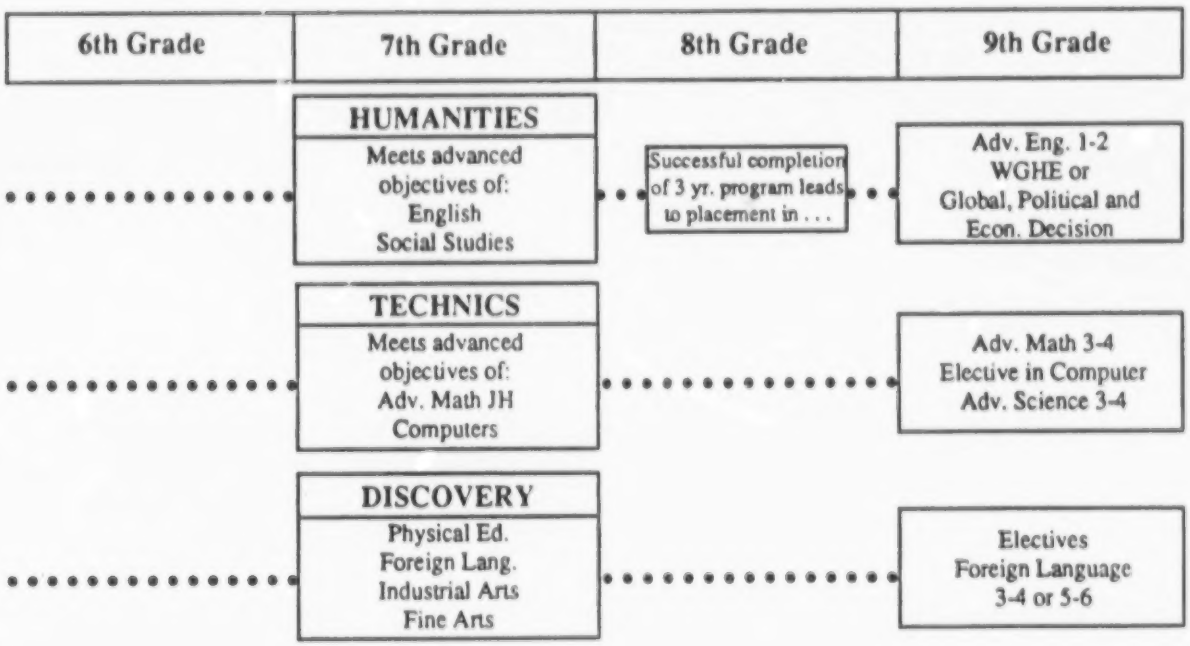
The team spent the first part of the evening session reviewing a Personnel Division form entitled "1990-91 Tentative Allocations of Certificated Personnel Units." This form, normally accessible only to administrators, indicated that the projected enrollment for O'Farrell when it opened was 396 seventh grade students. With this number of students, the district allocates a certain number of personnel units to the school. The district provided the team with 14.93 teaching personnel units. The team, through magnet school funds, earmarked an additional 5 personnel units for teaching positions. Bob posed the first budgetary decision the group had to make before the weekend closed. The team had 19.93 allocated teaching positions (14.93 from the original allocation and 5 from the magnet funds). The team had available two additional personnel units for the counselor and student supervision that could be converted into two additional teaching personnel units. In this situation, team members were responsible for a budgetary decision that would have an impact on personnel, class size (if they increased the teaching force by two positions), and their own school site responsibilities. The decision was left for the next day when they would decide on the educational family structure.

The large group then broke into smaller discussion groups to discuss the educational family structure. Each break-out group addressed three questions:

- How many kids should be in the families?,
- How many teachers should be in the families?, and
- Which teachers should be in the families?

The original model from which the team was operating combined components of other restructuring schools nationwide such as Central Park East in New York City, Capshaw in Santa Fe and Humanitas in Los Angeles. The proposed O'Farrell model had three educational families for humanities and technics (language arts, social studies, math, and science), and a separate discovery family (elective support such as foreign language and fine and applied arts).

O'Farrell's Original Planning Model



The small group discussion focused on whether or not each of the educational families should have themes, the importance of a common preparation period for the teachers, the role of discovery and advisories in the school day, and how the school day would be separated so that all of these activities could occur. The small groups provided opportunity for all team members to get involved in the discussion and to learn and interact with their colleagues from Santa Fe who had joined the team for the weekend. There was high

energy in the room during the discussion, especially for a Friday evening after the work week had ended.

The evening session set the stage for the following day, by involving all team members in the process. In one group a team member was overheard saying *"I never had to worry about teacher allocations before!"* The evening session provided participants with background information about O'Farrell, as well as an opportunity to discuss their ideas about school organization. Rather than making decisions during this first evening session, the team exchanged ideas in small group settings where it was easier to share opinions than in the large group setting. Since the team left decision making until the next day, participants had time to think about what was being discussed prior to starting the actual consensus process. More was to come.

The agenda for Saturday started with a morning session that would address the question— What is an educational family? The afternoon session intended to identify how the families would function together as a total school and which staff members would complete schoolwide administrative responsibilities. Since the discussion the night before was informational and process-oriented, it was not clear at the start of the day where the team was heading. Rather, the flow of ideas and consensus process would direct the day's proceedings.

Bob Stein opened the morning session with a charge to team members that today was the day to come to consensus on educational family structure and school governance. Bob shared five "essential" questions developed by the retreat planning group that would help direct the deliberations and decision process.

- Do you require a common planning time during the day or week? (If this is a belief, then that will determine discovery period).
- Can a teacher be in an educational family and discovery?
- What areas are core? What areas are discovery?
- What is important about the family structure?
- How is discipline handled within the structure of family?

The issues discussed centered on the core philosophy of the school— providing students with essential learning skills, meeting the social-emotional needs of children, and providing time for teachers to plan and work together. Throughout the conversation, Lorna from Capshaw Middle School in Santa Fe stressed the importance of common team planning time for each educational family. She believes:

> *"The most important element of teaching at Capshaw is that we have team planning <u>every</u> day. Continual planning and open communication is the most important element."*

This session ended with team members agreeing with Lorna that common planning time during the day was essential for all teachers. They also committed themselves to discovery activities, emphasizing that they would be an integral part of the school program. The next stage of the deliberations involved breaking into small groups to design structures for the educational families.

Team members broke into three groups to devise a school structure for approval by the team as a whole. One group of several teachers, the school's general secretary, and a community activist

saw the school divided into three educational families, each offering the core interdisciplinary subjects of math, language arts, social studies and science. (In California, science is not required at the middle school level.) This small group struggled with how to link the discovery or integrated electives into the educational families. As the group was discussing this issue, Jackie Jackson from the San Diego Urban League and Joanne Czarnecki, the school secretary, were discussing how they would link the discovery electives with the families. Out of their conversation came the suggestion that the discovery group be led by three "family facilitators." Each family facilitator would be a member of one educational family and therefore linked to instructional activities occurring in the core. They would also work as a team to coordinate community service activities, support thematic units, and provide physical education and elective activities.

Once Joanne and Jackie suggested the family facilitator idea, their small group took off with enthusiasm. This group saw it as extremely important that there be six teachers in each family along with support from a family facilitator. The need for 21 total teachers answered the previous night's question of whether or not the team wanted to devote resources to extra teachers. This group's feeling was that the 22:1 ratio was extremely important. This small group knew that they had devised the solution to the school structure issue and that the rest of the team would agree.

As would happen in consensus sessions in the other retreats, when the whole team reconvened they found that each small group had developed similar plans. The small student-teacher ratio was clearly supported across the three groups. The other two groups suggested that the discovery/enrichment activities might be supported by hourly employees who could offer specialized electives. Yet the group as a whole agreed with Joanne's and Jackie's family facilitator concept and echoed their group's enthusiasm towards the idea. When the session ended, the team as a whole was committed to three educational families with 132 students and six teachers in each family (22:1 student-teacher ratio). They also supported the family facilitator concept with three teachers responsible for one and one half hours of activities coordinated with the educational families and the philosophy of the school. Even though there were several unknowns left unresolved, such as whether or not specialized electives such as band would be offered, the team went to lunch with consensus on a direction for school structure.

After lunch on the patio overlooking the golf course, the team returned to discuss ways that the educational families could work as a total school and who would be responsible for schoolwide administrative responsibilities. The team struggled with whether or not the school needed a vice principal or administrative assistant, and if not, how the administrative responsibilities (report and grant writing, compliance monitoring, and communication with parents, central office and community) would be covered. Bob made several points that influenced the focus of the meeting. He noted that he had heard through the rumor mill that the some central office members were *"going to be disappointed if Team O'Farrell had a traditional vice-principal, since that would be just like business as usual."* Bob noted that the team had to transcend the current administrative paradigm and examine different models by which decisions could be made and administrative responsibilities met. With these comments the team broke off into smaller groups and reconvened with several models for meeting the administrative responsibilities of the school.

One group suggested that an administrative assistant work with the chief educational officer on administrative tasks. A team member reacted to this proposal by stating:

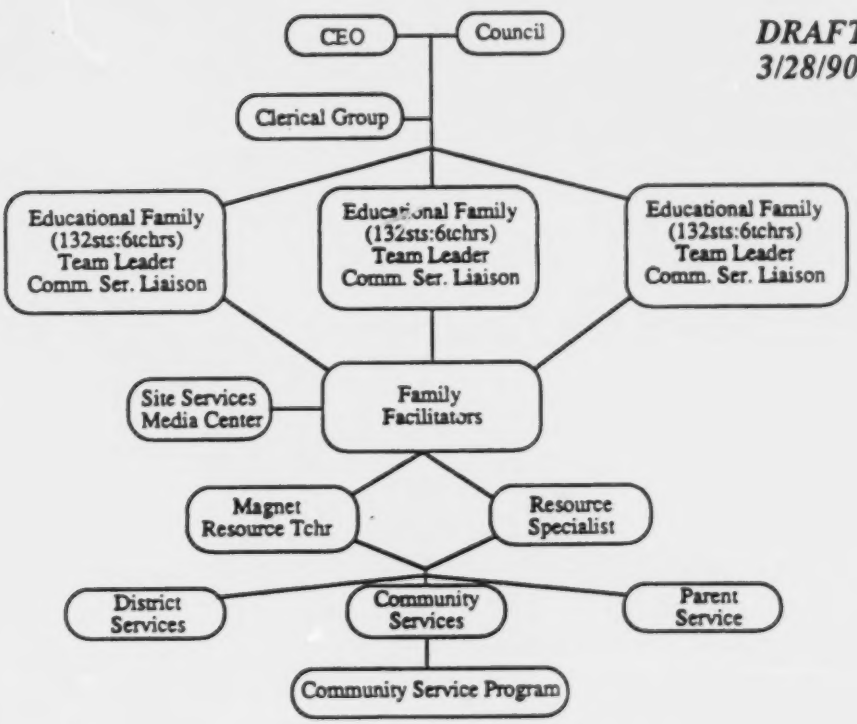
> *"When something walks like a duck, and quacks like a duck, and looks like a duck, call it a duck. The duck here, that we are calling an administrative assistant, sure looks like a vice principal."*

This comment had its influence on the team so that when anyone introduced a proposal that sustained the status quo with respect to school administration, duck calls could be heard in the room. The closest the group got to a "non-duck" proposal was to assign the administrative

responsibilities within the families, where two teachers would spend part of their day as "Pupil Administrative Liaisons" (PALs). Several teachers expressed interest in this proposal and felt that they could simultaneously complete administrative tasks and teach in the interdisciplinary core. Other team members noted that the PAL system would take time away from instructional activities. Still others stressed that if teachers were going to assume family and schoolwide administrative responsibilities, they would need the appropriate training in school governance, the Education Code, and report and compliance responsibilities to carry out this function. The team took a break at this point to enjoy the day, and to get some perspective on what they had decided. Several people went running, while others strolled the grounds, returning for dinner and one more evening session.

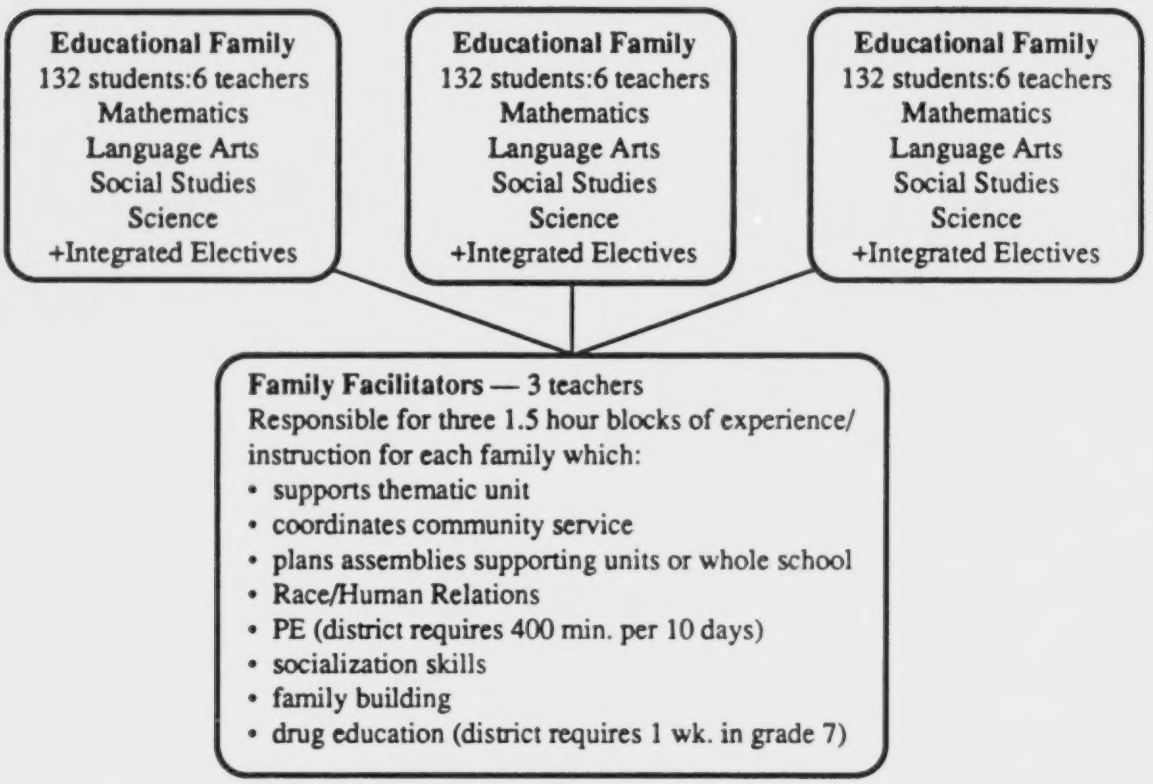
The closing session was renamed the "no-duck" proposal session. During the two hour break before dinner, several team members met and constructed a diagram for discussion by the whole team. They shifted the PAL concept slightly, giving family and schoolwide responsibilities to a "team leader." They also suggested that the team leader be funded by splitting the vice principal's and counselor's salary into three equal portions, so that each family would receive approximately $20,000 to accomplish the necessary administrative duties. The team leader would have 1.5 hours of release time from teaching every day to fulfill these responsibilities and could work extra hours or pay for additional assistance when necessary. Each family would manage these funds from within. This structure permitted teachers to develop leadership skills and help run a school without abandoning their teaching. The role of the principal changed too, as Bob noted, when he said "*if the teachers are empowered to do administrative duties, then I can be with children more and deal more with the community and the district.*"

O'Farrell's Proposed School Structure



O'Farrell's Proposed Family Structure

Draft 3/28/90



The discussion that followed involved several teachers discussing how they could see handling administrative duties and teaching responsibilities.

> *"...This broadens the professional experience for teachers. ..There really is not much difference whether there are three or two teachers delivering the instructional block ..and the flow of instruction will not be hurt "* (if one teacher is released for administrative duties).

The group decided that teachers could and should handle administrative responsibilities within the families. They left unanswered who would assume the team leader role and how they would work with Bob. Consensus on leadership within the teams provided direction from which the team could make these decisions in the future.

At one point toward the end of the discussion, Steve from Capshaw Middle School in Santa Fe asked,*"Are you sure, is the group really sure about this teacher/administrator role and the whole structure you have just designed."* His voice had both doubt and challenge in it, as though he were thinking that something wasn't right. But the team responded with confidence that the family facilitator role, the 22:1 ratio, and the teacher/administrator were the right decisions for O'Farrell. Steve responded by supporting the team's decision process and stating that "*I was just making sure.*" After many hours of planning and decision making, Team O'Farrell walked away from the Whispering Palms Country Club with a school structure in which they had confidence.

Retreat II
Social - Emotional Needs and Community Service
May 4 - 5, 1990, Kings Inn

Laughter and conversation filled the Kings Inn Cardinal Room as Team O'Farrell members greeted each other and found places to sit at the white-clothed tables scattered around the room. New team members were warmly welcomed as they arrived and each was presented with a personalized green and white name tag made by Joe Nierodzinski, one of the O'Farrell teachers. The phrases "Team O'Farrell" and "The Dream Team" appear on the engraved plastic tags worn by all team members. As Joe handed out badges, smiles appeared as a few more people became members of The Dream Team.

White butcher-paper posters covered the walls of the meeting room, reminding team members of various parts of the O'Farrell vision and calling attention to O'Farrell's uniqueness. "Team O'Farrell Speaks a Second Language" one announced, listing O'Farrell vocabulary words such as "Chief Educational Officer (CEO)," "Technics, " "Interdisciplinary Teams," "Educational Families," and "Advocacies." Another colorful poster listed the names of people who had joined Team O'Farrell since the last retreat.

This second Team O'Farrell retreat, that focused on the the social/emotional needs of students and on community service, was held at the Kings Inn in Mission Valley from Friday evening to Saturday evening, May 4-5, 1990. The team chose an in-town location to make it easier for representatives from San Diego social service agencies such as the Urban League, the Career Development Center, Children Having Children, the Department of Social Services, and the Probation Department to attend. All of the retreat participants had the chance to spend the night at the Kings Inn and received $100 stipend checks for attending. By 5:30 p.m. on Friday evening, most of the team had arrived, checked into their rooms, discovered the supply of complimentary soft drinks, and were ready to begin. At the end of a long work week at their regular jobs, team members began the retreat with an intense four-hour working session.

O'Farrell CEO Bob Stein set the tone for the retreat by asking participants to close their eyes and listen carefully to the words of George Benson as he sang "The Greatest Love of All." People listened as the Benson song started with, *"I believe that children are our future."* Bob then encouraged teachers, community members, central office staff, community social service agency representatives, parents, researchers, and support staff to *"forget what happened at your jobs and in your lives this week and focus your creative talents and energy on our dream. Do it for the children, because through O'Farrell we are going to change the world."* The diverse group at the retreat began the task of working together to plan ways to meet the needs of the children in their lives. Although they had often provided services to the same group of children and families, they rarely had an opportunity to develop working relationships or to participate in the creation of a common plan.

Bob's opening remarks briefly traced the development of the O'Farrell vision and reviewed the family structure that had been developed at the first retreat. This technique provided new team members with the necessary background information they needed to participate in the retreat and focused others on the task at hand. The agenda divided the retreat into four sessions. Session One on Friday evening featured a simulation activity designed to help the team develop insight into the diverse social and emotional needs of middle level students. In Session Two on Saturday morning, participants would create a plan to meet the social and emotional needs of students. Session Three on Saturday afternoon would focus on planning for student community service. And Session Four on Saturday evening would be used to wrap up unfinished business and to conduct a group roundtable.

Following the agenda overview, attention was turned to the two major objectives of this retreat:

- To define a plan to meet the social/emotional needs of children through advisories and community agencies, and
- To develop a method for implementing the community service component of the O'Farrell plan.

The first objective, defining a plan to meet the social and emotional needs of students, was introduced through a role-playing activity called "Mapping for Success". This exercise introduced team members to a mapping technique that will be used to help O'Farrell teachers understand the social and emotional needs of students. Retreat participants were divided into four groups and one member of each group was "mapped" in an effort to help define and develop a plan for reaching a personal dream. The person being "mapped" and fellow team members used six questions to structure the mapping process:

- What is this person's story?
- What is this person's dream at O'Farrell?
- What is this person's nightmare?
- What gifts does this person bring to O'Farrell?
- What does this person need to make his/her dream come true?
- How can O'Farrell provide what this person needs to reach his/her dream?

During the small group mapping activity, team member "subjects" shared their thoughts, fears, and dreams. Participation in the mapping activity gave team members an appreciation for the process and an experience that they could view from a student perspective. "*Imagine how a child would feel*," said one participant, "*if five or six adults cared enough to spend time really listening to his thoughts and fears and dreams.*"

During the dinner that followed the mapping activity, retreat participants talked informally. Seated at one table was a community agency representative and her husband. The agency that the woman represented was interested in working with Team O'Farrell, and she was delighted to be invited to attend the weekend retreat. Her husband, however, was less delighted and attended the retreat so that he could "*at least see a little bit of my wife this weekend.*"

The "Mapping for Success" activity was repeated in a different context after dinner when four team members assumed fictitious identities and told their stories to the group.

> *Hi, I'm Lenora. I guess I'm supposed to tell you about myself. I'm 13 years old and I live with my mom. She's 26 and we get along O.K. I have the cutest baby sister. My mom is away at work a lot and so I have to help out with babysitting. That's why I miss school sometimes... well, maybe a lot. School is OK, but I have other things to do that are more important to me. I'm in love with someone special right now. Is that what you wanted to know?...*

Hello, my name is Sandra. I was told that I should meet with you so that we could create a map for me. Let's see, where should I start? We'll, I'm from La Jolla. My parents have important jobs and do very well, I guess. I've travelled quite a bit -- to Paris and other places. Mom and dad say that any new experience is educational. I guess that's why they applied for me to come to this school -- so that I could meet some new kinds of people. I don't understand why that's important, I was doing just fine at my own school. I don't need these kinds of friends. Is that all?...

(Bill, in character, nervously read his statement from a script that he had prepared ahead of time) I'm Bill. I am 13 years old. Some people say that I am mentally retarded. I can read from the second grade reader. I'm good at some things. I'm on the Special Olympics team. I'm good at brushing and combing my hair. And I'm really good at cleaning and vacuuming and taking out the trash. I may want to be a janitor when I grow up. I eat fast at lunch. You have to watch me eat so that I don't gag. Sometimes I forget to go to the bathroom and I have an accident, but only one or two times a month...Thank you for listening to me.

(Bob) ...I don't want to do this thing! ...I'm from the Bronx ...I'm 14 ..I feel older. I go to school sometimes, but not on Mondays or Fridays. I kind of like school--it's safe for me here ...I love my mom. I never see my dad ..I have a twin bro named Bill ..I'm in a gang -- I want to be a Stomper in the Jompers. Fat Pete got money, a car, women, sleeps when he wants to. I want to be like Fat Pete. Chucko, he got shot. Good lookin' guy ..Jaime Escalante, that teacher ...he tells kids to hide their books when they to to school, but I can't hide mine ...So ... my advocate is going to map me? ...So come on and try !

As the four told their stories to the team the room was virtually silent. The storytellers became lost in their tales, and seemed to actually become the students that they were describing. The group that watched and listened was so caught up in the drama being played that they, too, entered the world of the student. "Mapping for Success" ceased to be a technique to be learned and became a valuable tool for reaching and understanding children.

Following the large group storytelling, each of the four 'students' became the subject of a small group mapping activity. The six questions listed above guided the development of a personal map for each student. When small groups had finished their student mapping, they shared their results with the total team.

After the mapping activity, Bob told the team that maps would be made for all children at O'Farrell, and that real O'Farrell students would be as diverse and wonderful as the four 'students' the team had just encountered. "*It is our responsibility*", he said, "*to help every one of our kids reach a personal dream. For if we lose any kid or team member, we lose a piece of our dream. We must use all of Team O'Farrell's gifts to meet all of O'Farrell's needs.*"

As the evening closed, the retreat action captains Lenora Smith and Sandra Woodruff summarized the session and outlined the plan for Saturday. "*We have developed maps to help adults reach their dreams,*" they said, "*and we have made maps to help students reach their dreams. Tomorrow we will create a map that will lead O'Farrell to its dream. We will develop a plan that will meet the social and emotional needs of our children and we will define a plan for student involvement in community service.*" The session over, retreat

participants slowly drifted off toward their rooms and a much earned rest. The retreat planners, however, met late into the evening to debrief and refine plans for the next day.

The team met for a hearty breakfast early Saturday morning in the Kings Grille. Conversation was lively and varied, even at that hour of the morning. One table was comparing the different cultural needs of diverse groups of students; another was brainstorming ways to increase parent involvement at O'Farrell. At one table, an action captain had spread out a world map that had been drawn to accurately represent the land mass of each continent. Several teachers were discussing ways that various map projections could be used to stimulate student involvement in interdisciplinary instruction. No one complained about missing a Saturday morning sleep-in.

After breakfast, the group moved to the Lancers Room to begin the day's session. Representatives from additional social service agencies joined the group for the Saturday meeting, bringing the group size to around 40. Bob briefly reviewed the Friday evening activities and encouraged flexibility, commitment, and shared purpose as the group worked together to create the perfect school for all children. "*This is consensus day*," he said, "*By this evening the social/emotional component of our O'Farrell plan will be complete -- and we will have done it together.*"

Bob then turned the meeting over to the two retreat action captains, Lenora and Sandra, who outlined the structure of the day. They explained that the morning sessions would be devoted to defining student advocacy groups and developing a plan to meet the social and emotional needs of O'Farrell students. The afternoon sessions would focus on planning for student involvement in community service. Lenora and Sandra spent time describing the planning process and explaining that all decisions made by Team O'Farrell are made by consensus. The structure for reaching consensus, they said, included the following steps.

- The issue/problem is discussed first in a large group setting so that the problem is defined clearly and every team member understands key concepts.
- The large group breaks up into smaller, heterogeneous groups to formulate a plan which addresses the issue/problem. It is important that a variety of roles (teacher, community member, parent, community agency representative), ethnic backgrounds, and points of view are represented in each small group. Results from small group sessions are summarized on large butcher paper sheets.
- A representative from each small group shares the plans developed with the large group and clarifies important points, if necessary.
- An action captain consolidates small group plans into a Team O'Farrell plan as each group speaks. The team plan is also clearly outlined on butcher paper.
- The action captain reviews the consolidated plan for the large group and records changes and additional ideas the team may provides. Debate on key points is encouraged.
- Consensus is reached when **everyone** on the team agrees with the ideas contained in the finished plan. A vote is not taken. If consensus cannot be reached, the plan is tabled and the group returns to discuss it at a later time.

Before beginning the discussion on advocacy, retreat leaders reviewed the school structure, described the daily schedule, and defined key terms. The daily advocacy period was determined to be central to the development of a plan that would meet all students' social and emotional needs. The action captains shared the Team O'Farrell vision of a partnership between O'Farrell Community School and San Diego social service agencies. The combined efforts of O'Farrell Community School and community social service agencies, they said, would be a powerful way to better meet the social and emotional needs of all students. The large group used brainstorming techniques to generate answers to two questions related to the school-agency partnership. First, what can community agencies do for O'Farrell children and families? Second, what can O'Farrell do for community agencies? A comprehensive list of services that could be offered by community agencies quickly evolved, such as:

- providing training in independent living skills, self-sufficiency skills, effective parenting, and career and vocational awareness,
- providing recreational activities for students by sponsoring athletic leagues, park programs, and field trips,
- providing tutoring and counseling services,
- serving as mentors, mediators, role models, speakers and advocates for students, and
- providing assistance with student job searches, drop-out recovery, drug and alcohol education, and child care.

Georgia Tate, Deputy Director of the San Diego County Department of Social Services led the discussion on what O'Farrell could offer community social service agencies. She told the group how excited she was to be a member of Team O'Farrell and to help design a school for all children. She pointed out that accessibility to students and families at O'Farrell would increase her agency's ability to provide services. Georgia also spoke of Social Services Department Director Jake Jacobsen's commitment to the project. She told how pleased he was at the possibility of providing social services on campus. The prospect of having permanent office space at O'Farrell was a real bonus for Georgia as well. "*Imagine,*" she said, "***a whole wing for social services -- not a little cubicle, but a whole wing!***" Georgia's energetic personal commitment to school-agency partnerships served to focus the team's thinking and increased their levels of involvement in the small group discussions that followed.

The large group broke into small, heterogeneous focus groups for planning. Each group contained a balance of old and new team members, men and women, members of various ethnic groups, and a variety of job roles. Small groups found meeting places in shady areas of the hotel grounds or at tables by the pool. Each small group considered ways the team could meet the social and emotional needs of children within the structure of the school day and ways in which students' special needs might be met in a broader context. One member of each group assumed the role of recorder and another worked to facilitate group discussion.

One small group spent a considerable amount of time developing a definition and description of advocacy groups. The teachers in the group had discussed advocacy groups at previous team meetings, and they had a clear understanding of the advocacy concept. The members of the group whose experiences were outside the "educational community,"

however, had a more difficult time understanding the concept. The group was insistent, however, that all of the group members feel comfortable with the definition before the group moved on to further planning. Decision-making by consensus seemed to be a natural part of the small group process, even when no formal "authority figure" was present to encourage it. The plan that emerged stressed the importance of advocacy groups in meeting students' daily social and emotional needs. The group also addressed the issues of communication between agencies and educational families, participation in advocacies by community service agencies and parents, service delivery in a timely manner, proactive planning, staff training by agency personnel, coordination of services, and frequent home-school communication.

At the end of the morning session, each small group shared its plan in a debriefing exercise. As the small group plans were summarized on to butcher paper sheets, the group was struck by the similarities that emerged. Many of the ideas expressed were easily agreed upon by the total team, and as they were recorded a number of team members called out support for them. The team believed that daily advocacy periods should be a regular, scheduled part of every school day. They decided that advocacies would be led by teaching staff with possible assistance from classified staff members, parents, or community agency personnel. Advocacy sessions would provide opportunities for students to develop positive self-esteem, learn new study skills, practice conflict resolution techniques, clarify values, celebrate achievements, and to communicate with others in a caring, safe, positive, and supportive environment. The team member assigned to each advocacy group will serve as an advocate and home-school link for each of the students in the group. Social and emotional needs which cannot be met through advocacy support or within educational families will be referred to the appropriate social service agencies.

One issue, however, could not be agreed upon by consensus. Some team members felt that students should be assigned to advocacies outside of their educational families. They defended their position by arguing that a teacher cannot be a true advocate for any student if that teacher is involved in his or her academic life. True advocates, they said, should be free to think only about what is best for the child. Others in the group felt that the advocacies should be extensions of educational families. In this situation, they argued, the advocate really knows all there is to know about the student and can take informed action for the child. If advocacies are structured within educational families, the feeling of family can be reinforced, meaningful parent contact can take place, and continuity can be maintained. This issue was debated hotly for quite some time, and the tension in the room was evident. Although the group wanted to pursue the issue, the actions captains finally succeeded in tabling the issue until a later time so that the retreat could continue.

As work continued on the social and emotional component of the O'Farrell plan, it became apparent that good communication between school staff and community agencies was essential. The group decided that a services coordinator -- the Family Advocate -- was needed to provide a link between educational families and service agencies, especially since school staff are not always aware of the available community agency services. Such a coordinator would be comfortable in both the school world and the agency world. The coordinator might organize a parent volunteer program, recruit agency representatives to work with advocacy groups, produce a services directory, schedule appointments for children with appropriate agencies, provide training for school staff, and work with educational families to develop plans for meeting student needs. Community agency representatives and O'Farrell staff agreed that a services coordinator position be added to the O'Farrell plan, and that it be full-time, on-site, and co-funded by the Department of Social Services and the school district. The session ended and the team moved to the Kings Grille for a Cinco de Mayo lunch.

The format of the morning session was repeated in the afternoon as the group considered the issue of student community service. In a large group setting, the group worked first to define the term community service and then to discuss ways in which O'Farrell students could serve community. Following large group discussion, new small groups formed to develop plans for community service. At the debriefing which followed the planning session, each small group presented its ideas. On the surface, the plans were less similar than those of the morning session, but as they were summarized on butcher paper the group realized that they complemented each other well. The process of refining and augmenting the group's ideas was extensive, with suggestions pouring in faster than the action captains could record them. Everyone in the room seemed to be caught up in the excitement of a shared vision. At that moment men, women, teachers, central office administrators, parents, researchers, community service providers, support staff, spouses, Hispanics, African Americans, and whites were working together on a community service plan for children.

The team described community service at O'Farrell as "a social responsibility involving the entire school community, an opportunity to link individual gifts with community needs, and a chance to enhance individual growth through participation in both on and off-site activities." Community service might occur on different levels at O'Farrell. At first, students might engage in individual community service on a short-term basis. Later, group service projects which complement educational themes might be undertaken by educational families or advocacies. Still later, when O'Farrell had "settled in," long-term schoolwide service efforts might be undertaken. Consensus was easily reached on all of the issues that the team discussed. As the applause for consensus subsided, Bob exclaimed, "*Wait a minute! That was too easy! It should have been a lot harder to get 40 people to agree on this!*"

During the hour-long break that followed, retreat participants gathered informally in the hotel lobby, around the swimming pool, or in the coffee shop. They were exhausted after spending a long, hard, emotionally draining day in intense working sessions. Some team members drifted into sleep as they sat in a shady spot near the pool. The conversation that did continue was focused on children and the O'Farrell dream. While the rest of the team relaxed, action captains Lenora and Sandra worked to get ready for the evening "unfinished business" session. They then summarized and listed on butcher paper the items that needed to be clarified or expanded, items that had been tabled earlier in the retreat, and miscellaneous business items. The task was finished as dinner commenced.

During dinner, the husband of the community agency representative mentioned earlier participated very actively in a discussion on the merits of community service. His enthusiastic interaction with those around him and his animated expression indicated that his Friday night disinterest had been transformed into a sense of excitement about the Team O'Farrell dream.

After dinner, the team gathered for the final session of the retreat. Action captains led the discussion that followed, using their summary charts as a guide. Ideas clarified and expanded through group discussion included: the role of the social services coordinator, the role of the family facilitators, types of activities to be included in advocacy sessions, responsibility for disciplinary action in the absence of a vice principal, preparing the students and the community for community service, inclusion of special education students in community service projects, cultural awareness activities, communicating the O'Farrell way to parents and community, and school public relations. One team member called the group's attention to a major decision that had just been made. *"Do you realize,"* he said, *"that we have just shifted the responsibility for student suspension from the counselor or vice principal or principal to the teacher!"* The team decided to invite the district's legal counsel to advise them on the legal responsibilities of school administration.

The team also discussed the issue of student and staff assignment to advocacy groups at this closing session. The spirited debate of the morning session began again, and nearly everyone in the room tried to voice opinions on the subject simultaneously. The action captains guided the "discussion" skillfully, so that varying points of view were heard. Although the exchange was heated, team members were listening to the ideas of others. At one point, an administrator from the district office responded to the reasoning of a parent by remarking, "*O.K., you've convinced me!*" The group did not reach consensus on this issue and tabled it until a future meeting. The team recognized that it had made progress toward resolution of the issue, and was very willing to postpone the final decision. The action captains closed the session by summarizing questions that had been unanswered during the retreat. They included assigning students to advocacies/educational families, meeting the social and emotional needs of O'Farrell adults, tracing students after they leave O'Farrell to determine success, integration of special education students into families, discovering ways for O'Farrell adults to serve the community, and assisting teachers in their roles as advocates.

Bob ended the retreat by calling the name of each person present. As he called each name, that participant stood up to a round of applause. When all were standing, the traditional O'Farrell closing took place. Everyone clasped hands and stood in a circle as various people voiced their thoughts about the time that we had just spent together, their hopes for children, and their dreams for O'Farrell. Bob reviewed the task that had been set at the beginning of the retreat and reminded participants how difficult it had seemed. "*But you accomplished that task,*" he said with a smile, "*and more!*" Retreat participants were joined by family members for a celebration reception as the retreat ended.

Retreat III
Team Teaching and Interdisciplinary Curriculum
June 1 - 2, 1990, Whispering Palms

May 16, 1990

Dear O'Farrell Planning Team Member:

I am excited to invite you to attend Team O'Farrell's third weekend retreat on June 1-2, 1990. This retreat will be held at Whispering Palms, 4000 Cancha de Golf, Rancho Santa Fe, CA 92067.

Thanks to the Stuart Foundations Grant, your dinner and lodging (double occupancy) for Friday, June 1, and breakfast and lunch on June 2 will be provided as well as a stipend of $100 per participant for those attending the entire retreat. . . .

The focus of this retreat will be on interdisciplinary curriculum.
Participants will be engaged in the "nuts and bolts" planning necessary to bring Team O'Farrell's vision into the classroom on a daily basis.

Sincerely,
Dr. Bob Stein
Chief Educational Officer
O'Farrell Community School for Advanced Academic Studies

Whispering Palms was the setting for the third O'Farrell retreat held on Friday and Saturday, June 1-2, 1990. The retreat focused on team teaching and interdisciplinary instruction, and was attended by teachers, community members, researchers, parents, support staff, community agency representatives, and district office staff. The stated objectives of the retreat were:

- to review the concept of interdisciplinary instruction as it applies to the vision of O'Farrell,
- to conduct a simulation of interdisciplinary team planning for the first six-week unit, and
- to identify issues supporting interdisciplinary team planning.

As team members arrived at Whispering Palms they checked into their rooms and gathered in the lobby for relaxed conversation and a brief rest after their long work week. Promptly at 5:00 p.m. the group moved from the lobby to the upstairs meeting space adjacent to the guest rooms and swimming pool. As always, the CEO and action captains were quick to greet newcomers, point out the ample supply of soft drinks and coffee, and make sure that all retreat participants received the folders of informational material needed for retreat business.

Team member Lenora Smith opened the retreat by introducing each participant to the whole group. When she had finished, applause and whistles rewarded her for her accomplishment. Action captain Byron King then outlined the objectives and structure of the retreat. He explained that team members would experiment with a variety of teaching strategies, participate in team planning activities, and discuss the issue of student assessment. Byron pointed out that the first two retreats had focused on developing a plan that would support teaching and learning. "*This weekend,*" he said, "*will focus on the instructional core. We will begin to live the experience of working in educational families. We will probably be working with more people than any one of us has ever worked with before.*"

The first activity was a "Global Interdependence" exercise that might be used as an interdisciplinary teaching technique at O'Farrell. Retreat participants split up into four teams, and each team was given a large envelope containing a task card and several other materials ("natural resources"). Teams soon discovered that their tasks could not be completed using the materials contained in their own envelopes, and that other teams had materials and tools that they needed to succeed. In addition to the measuring, reading, cooperating, and constructing skills required by the tasks described on the task cards, the small groups used trading, borrowing, begging, stealing, improvising, and consulting skills to complete the activity. A loud cheer was heard as one team finished the activity ahead of the others.

The exercise was extended by Byron when he asked teams to think of ways that this activity could be adapted with new rules, or rewritten to make it more content specific. How might the game be made more cognitively challenging? What essential questions could be addressed using this activity? What skills are children developing while engaged in this exercise? What global issues might be addressed through this activity?

Before the group adjourned for dinner, Bob Stein spoke briefly about the O'Farrell vision and our progress toward the goal of a quality education for all children. "*We're very close to making history,*" he said, "*and we are doing it together.*" Bob then introduced Dennis

Gray, Practitioner in Residence from The Council for Basic Education, who would be leading the group in a Socratic seminar after dinner. In preparation for the seminar, Dennis asked the group to carefully read the story of "The Three Little Pigs." During dinner that evening, pig voices, wolf voices and other sound effects could be heard at almost every table.

After dinner, team members moved tables in the retreat meeting room into a large rectangular configuration. Participants took seats around the outside edges of the tables and displayed name cards at their places. Dennis passed out a list of five possible morals for the "Three Little Pigs" story, and asked team members to decide which moral best matched the story. The morals were:

- Some pigs deserve to die.
- Brains always beat brawn.
- Bad plans make for a bad end.
- Life is short; live it to the hilt.
- Never count on family.

Dennis tallied the number of votes that each moral received. During the discussion that followed, the group questioned each other, used evidence to defend positions, listened carefully to arguments, and clarified their own assumptions. Some of the comments voiced during the discussion related indirectly to the O'Farrell vision. A parent on the team remarked, "*Who says the last pig was smarter? They all left home with the same skills. It was just luck that kept the last one alive!*" Another team member thought that a new moral should be written with the O'Farrell dream in mind, that "*all pigs can learn!*"

As the group members reviewed the seminar session, they remarked that all participants seemed engaged in the process, and interacted at a variety of levels with varying degrees of perception. The group also noted that the level of thinking involved seemed quite complex. They agreed that this technique would be very effective in an interdisciplinary setting, and many team members expressed a desire for further training. Dennis announced that he was recruiting schools to participate in a Socratic pilot project for the next school year, and invited O'Farrell to be included in the project.

Next, Dennis showed the group one way that "The Three Little Pigs" exercise could be extended. The large group broke up into four small groups, and each was asked to retell the story from a different point of view -- the mother pig, the straw pig, the stick pig, and the wolf. As each small group presented its version of the story to the large group, Bob recorded the performances on video tape. The presentations were creative and full of fun. One was even set to the music of "Fiddler on the Roof" --- "If I were a rich pig, oinky, oinky, oinky, oinky, oinky, oinky, oinky, oink!" The group noted how effective this technique would be for helping children develop an understanding of the perspectives and beliefs of others.

Byron brought the evening session to a close by describing the activities for Saturday morning. Teachers would be divided into three small groups that would simulate O'Farrell "educational families." Teachers from the four major subject areas would be included on each team, and specialty teachers would be divided among the teams. The three teams would work to create core instructional units for the first two weeks of school that would include the content areas of Language Arts, Math, Practical Arts, Science, Social Studies,

and Visual/Performing Arts. The issues of cultural diversity, affective themes, study skills, homework, and scheduling would also be considered.

One new team member voiced the concern that having three teams working on different plans might be a wasted effort. She wondered whether the whole group working together might have more ideas and come up with a better plan. Byron explained the reasons for dividing into teams, and noted that the planning activity had two purposes. First, small group sessions would give teachers a chance to experience the process of working together in planning interdisciplinary teaching units. A discussion of each team's experiences could then be used to improve the planning process. Second, as in past retreats, the ideas generated by the small planning groups would be shared with the large group, clarified and expanded, and used as a part of the Team O'Farrell consensus process. The team member who raised the issue was satisfied with Byron's explanation. After reminding the group that breakfast would be served at 7:30 a.m., Byron wished the team good night. The interdisciplinary planning committee continued to meet to plan the next day's activities.

Retreat participants enjoyed a relaxed Saturday morning breakfast, and then met in the upstairs meeting room once again. Team member Kathy Lathus greeted the group and briefly reviewed the activity for the morning. For the purpose of the planning activity, the team had been divided into three simulated educational families --The Jalapenos, The Tabascos, and The Chiles. Retreat planners pointed out that assignments to particular teams were not permanent. The task for the morning would be to outline a plan for the core instructional block for the first two weeks of school. Many members of the group had questions about the task at hand, but Byron asked that the teams begin the exercise and see "*how it plays out.*" Small groups gathered near the pool or in guest rooms and began to work.

While teachers were working in groups to plan interdisciplinary units, Bob invited parents and community members to meet with him for an informal "seminar." Action captains had noticed that it was sometimes difficult for non-teacher members of the team to participate fully in discussions because they did not have enough general knowledge about schools and schooling, particularly at the junior high school level. Bob agreed to provide parents and community members with some conversation time and background information.

"*To understand how different O'Farrell will be,*" Bob said, "*you have to know a little bit about what it is like to be in a regular junior high school in 1990.*" He then described the typical junior high school day -- crowded classes, confusing scheduling, fragmented academic subjects, six different teachers, lack of choice, and the absence of a sense of belonging to a group. "*The adjustment from the elementary school environment,*" he said, "*is very difficult for most kids.*" Several parents remarked that the junior high school that he had described sounded just like the ones that they had attended some 25 years before!

The teacher interdisciplinary groups, meanwhile, were working to develop their plans for the first two weeks of school. Although the task was the same for each group, both the planning processes and unit emphases were very different. One group spent most of its planning time defining "non-negotiable" rules and guidelines relating to attendance, dress, conduct, supplies, and reporting. Another group focused mostly on the unit theme and product. The third group chose to discuss ways in which students could become more involved in the process of learning, and struggled with issues related to teaching strategies and organization of the learning environment. Team recorders summarized their group plan on butcher paper as the session ended, and team members regrouped in the meeting room. Butcher paper summaries were posted on the wall.

Lenora welcomed participants back from their individual sessions, and told them that they would be spending some time talking about the team planning process. The discussion that followed was similar to a Socratic seminar, where participants listened to each speaker in turn without making judgmental remarks. Some of the reflections that team members voiced about the planning process follow.

- *It takes time to get used to working with other members of the group.*
- *As the group gets to know one another better the group works faster. I loved watching our group go from focus to dream and back again.*
- *We all have the same goal, just different paths. Our diversity gives us strength.*
- *The parents just want to know what you're doing. We aren't trying to tell you what to do, but we expect you to want our input. How will we work with teachers? We want you to know that we are here.*
- *I'm glad that Bob explained the traditional junior high school. That's great, but I'm still not sure. I want to know what advanced subjects are. I understand that instead of four or five subjects O'Farrell kids get eight or nine. That's great and wonderful, but I am concerned. I'm glad to be part of the team and I will hang in there and ask questions, but I must be satisfied that you will be ready for September 4.*
- *It really is important to listen. Everything has to be negotiable.*
- *I observed tremendous diversity. Maintaining diversity is very frustrating, but very important. If we can keep diversity in our teams we will be more able to appreciate diversity in our kids. I thrive in chaos.*
- *Trust was the key. We trusted each other enough to turn loose of our disciplines.*

As the roundtable ended, several teachers indicated that they were uneasy about the number of questions that they were unable to answer in their small groups. They hoped that the large group would spend a few minutes discussing and clarifying them, and that they could be listed for future consideration. The list that developed included the following.

- Who will decide what instructional materials are needed and who will order them?
- How will we communicate the "O'Farrell Way" to new teachers, substitute teachers, and students?
- How can we build one school from three houses? How can we avoid family competition and jealousy?
- How will children and teachers be assigned to educational families?
- How will special education children be assigned to families and given support?
- Who will coordinate the use of space and equipment? How will we know where we will be when school opens?

Action captains briefed the team on the activities that were to take place after lunch. They told the group that they would be addressing the issue of student assessment. Several team members interrupted the action captains to ask when the interdisciplinary plans the small groups had designed that morning would be shared with the large group. They were told that the important outcome of the planning process had been the examination of that process, and that there were no plans to share small group results with the whole group. At the insistence of the team, the small group plans were shared before the group moved to the clubhouse for lunch.

The team discussed results of the morning team planning exercise briefly after lunch. Although the focus of each small interdisciplinary group had been somewhat different, there were several common elements in each plan. All groups believed that the first two weeks of school should serve to help students and teachers become comfortable with their educational families and with the school. Clear expectations for behavior should be communicated, and an emphasis on "The O'Farrell Way" should be stressed. *"We don't want our kids to act like normal junior high kids,"* said one team member,*"we want them to act like O'Farrell kids!"* Activities suggested to contribute to this process included unique and up-beat methods of staff and student introduction, development of family picture albums and journals, an O'Farrell treasure hunt, the adoption of family names, logos, raps, or flags, and tours of the campus. In addition, team members suggested that interest in academics might be stimulated by involving students in at least one high-interest, hands-on activity in each subject area during the first two weeks of school.

Next, the team turned its attention to the issue of student assessment. Bob mentioned to the group that the student assessment piece of the O'Farrell plan should be strongly linked to instruction, and that it must provide comprehensive and meaningful information to students, parents, teachers, the community, and the district. The same small groups that met to develop interdisciplinary curriculum (Tabascos, Jalapenos, and Chiles) gathered to discuss the assessment questions listed in the agenda.

- How is student progress assessed?
- How is student progress reported to parents and the district?
- How does assessment affect the number of instructional themes per year?

The small groups generally agreed that student assessment at O'Farrell would be frequent and detailed, would occur at the end of thematic units, would involve students, teachers, and parents when possible, and would be based on portfolios, performance-based tasks, and projects. The team felt that clearly stated expectations and frequent communication with parents would serve to make assessment data more meaningful and useful to parents as they worked with the school to assure student success. One group hoped that students would complete a weekly self-evaluation.

The large group discussion stimulated animated debate on other issues. One group stressed the importance of assessing student behavior each day because of the impact that it had on learning. They felt that behavior could be easily monitored if every student carried a small daily report card to each class. If the student had no behavior problems that day, the card would be initialed by a teacher when the class block was over. Any problems (such as lack of homework or inappropriate behavior) could be noted on the card. The card would be turned in to the student's advocate at the end of the day and advocates would inform parents if problems occurred. There were differences of opinion about the importance of a behavior report card.

- Teacher: *"That just seems like it would take too much time away from the kids. I'd rather spend my time with the kids."*

- Parent: *"If you don't want to do a daily report, this will be just like any other school. Don't we want to know each child and keep in touch with the parents?"*

Another issue the group discussed had to do with ways in which O'Farrell would report student progress to parents and the district. Most felt that the district report card system could not be used to communicate the rich and detailed assessment information that would be gathered about students at O'Farrell. The group had an extended conversation on alternative modes of student assessment that included the following comments.

- *"Assessment should tell a child's story. If you really want to know if an O'Farrell kid can speak, write, compute -- watch them do it! A multiple-choice test on writing can't be used to find out if a kid can write."*

- *"If we are serious about changing the system, we must just do it. We can't care about how the rest of the system reacts."*

- *"We should survey our constituents. It's important to ask parents how they feel about assessment. It's important that they get involved."*

- *"We're not going to get anything from the district unless we ask for it!"*

- *"Nobody knows more or less about assessment than the people in this room. Maybe we should start out with both kinds of assessment. Let's not give up the old piece, but add to it."*

- *"Aren't we making too many battles to fight in September. Shouldn't we work up to changing the grading system? There are only 24 hours in a day and we can't do it all. Maybe we should choose our battles before we start to fight."*

- *"If you have a big chasm to cross, you aren't going to do it with little jumps. Let's put energy into what does not already exist. It seems a waste of time to work with a system we do not believe in."*

- *"The only parents who are happy with 'A' 'B' 'C' grades are the parents of the 'A' students. Letter grades don't really tell parents anything; our system will. We should inform the parents and then just do it. We'll have to slowly educate the community as we go along."*

Most of the teachers in the group were in favor of doing away with letter grades, and hoped that O'Farrell could rely on frequent parent communication and periodic written reports for assessment. Parents, on the other hand, were less sure about giving up the traditional grading system. They wanted specific information on the types of data that would be used to assess students, assurances that the O'Farrell assessment system would be better than more traditional methods of assessment, and the promise that the lack of a standard report card would not be a problem when their children moved on to high school. As one parent said, *"I need to know up front how this works. I think I know what 'A' work is, but without grades how do I know if my child is doing well? How will other schools know that my child is a good student?"* The team did not reach consensus on the issue of methods for reporting student progress, and tabled it for consideration at a future team

meeting. Although consensus was not reached, the team did engage in open dialogue on grading practices, and the issue was left open for future discussion and debate.

The group discussed other issues pertaining to grading such as whether O'Farrell would be required by the district to issue letter grades on a standard report card or whether O'Farrell might be allowed to design and use a reporting system of its own. Some members of the group mentioned that regular letter grades might be needed for high school placement and for cumulative records, or when a child moved to another school district.

A tired Team O'Farrell then briefly discussed ways to link teacher specialists (Industrial Arts, Visual and Performing Arts, Music, P.E.) with educational families. Some ideas mentioned included: rotating specialists on a weekly, monthly, or yearly basis, assigning students to families according to their interests, letting the specialists come up with their own plan, extending or modifying the daily plan, and taking a "too bad, it's the luck of the draw" attitude. The team did not reach consensus on this issue, either, and tabled it for future consideration.

Bob spent a few minutes on announcements prior to the end of the retreat, emphasizing the moving dates for the school. The School for Creative and Performing Arts had been scheduled to move out of the O'Farrell site from August 27 to September 4, 1990. *"Just in case you forgot,"* said Bob, *"we are scheduled to open for students on September 4. But don't worry! We will be ready for the kids. If you are a person who likes to have your bulletin boards up when school opens, you might have a bit of a problem this year. But...we won't be bored!"* The retreat ended with the traditional O'Farrell closing, and the team headed back to San Diego.

This retreat accomplished several things. First, teachers had the opportunity to work together in "educational family" teams to plan curriculum and instruction. These simulated planning sessions gave team members the feel of what collaborative planning in teams would be like. Second, teaching staff, parents, community members and other team members started the consensus process on student assessment. Although they did not reach consensus on this issue, they identified areas of concern that need to be addressed prior to making a final decision. Rather than mandating a decision, they initiated a dialogue that will help structure any future discussions and decisions regarding this issue.

Interviews : Issues and Themes

Interviews with twelve team members provide a sense of their perspective on the O'Farrell vision. These interviews were exploratory in nature and serve to identify issues and themes that may warrant additional investigation and attention as the school continues to evolve. Eight staff members from the team, two community members, and two parents agreed to be interviewed. The information reported below focuses on the respondents' perspectives of the O'Farrell vision, success at O'Farrell, the various components of the "dream," the year-long preparation and planning time, and expectations and fears that are emerging as the school's opening approaches.

All respondents (team staff, community members, and parents) were in agreement on the team's vision— that O'Farrell will be a school where the expectations are high and where all students will have access to an innovative program leading to academic success. Most staff respondents noted that they originally got involved in O'Farrell because they knew Bob or one of the original team members, and that the school's vision fit their own teaching style and philosophy. Community members and parents also noted, with praise, their

interaction with Bob and their interest in working in a school environment where they were invited and encouraged to be active participants.

Respondents agreed that the year-long planning time had been both necessary and effective. Staff stated that *"I had never had a chance to plan before"* and *"you can't just restructure, you need time."* All agreed that it was important to bring different people together to build trust, a common mission, and to establish an atmosphere where risk taking was acceptable to all parties. Several staff members did express some frustration with having to do two jobs at the same time since they were on duty at their old schools while planning for O'Farrell. They suggested that the whole team should have been released in early January so they all could focus on O'Farrell's development.

Respondents had similar perspectives on what constitutes success at O'Farrell, however, they ranked these perspectives differently. O'Farrell staff will consider the school successful when there is evidence of high self-esteem among all students and a desire of students to stay in school. Staff want the kids to be "turned on" to school and to demonstrate school pride. They also listed academic progress and student access to all programs as elements of a successful program. Community members will consider the school successful if everything is in place on September 4, there is evidence of student commitment and pride, and the teachers and community agency representatives continue their commitment and enthusiasm. The parents stressed academic success as their primary indicator of success as well as having motivated, happy kids who like school.

We asked the respondents to state which element of the O'Farrell vision would have the highest priority once in practice. Most O'Farrell staff stated that the social-emotional component of the program was the most important part of the vision. They believed that academic excellence could be achieved only if the students' social and emotional needs were addressed and met. Community members stressed the close teacher-student relationship and the shared school governance as the most important elements of the program. Parents stressed that access to a high level curriculum and academic excellence was the most important feature of the school, with one parent stating that *"all the other stuff is extra."*

Respondents concurred that a school like O'Farrell needs strong commitments, a willingness to take risks, and the elimination of adversarial relationships from all parties to be successful. This includes having a supportive administration, dedicated and committed teachers, strong and active teacher-parent relationships, and community involvement. All respondents noted that even in a situation of shared decision making, strong leadership was still necessary. O'Farrell staff sees the chief educational officer as a stabilizing force who serves as coordinator, motivator and, when necessary, as the buffer to conflict. Community members see the school administrator as someone who remains in charge, respecting the fact that the decisions do not rest solely in his hands. Parents stressed that the administrator should serve to keep the school on course, to resolve issues the teachers are unable to solve, and to maintain a constant link to parent and the community.

We asked all respondents to tell us about any fears they might have regarding O'Farrell and its vision. One O'Farrell staff member wondered whether everyone was actually committed to the school's vision and how the team will address potentially different levels of commitment when the doors finally open in September. Another staff member wondered whether the dream of preparing all students for college preparatory and Advanced Placement curricula upon completion of the O'Farrell program might be somewhat naive and unrealistic. Several staff members expressed concern about whether the site would be ready in September, and whether or not the district will actually continue to support O'Farrell or *"force it back into the mold."*

Community members expressed concerns about quality control across educational families, the need for more ethnic balance on the team that reflects the O'Farrell community, and the need to develop a mechanism that will get parents involved. They also stated that the success of the school is dependent on the total support from teachers and staff, the school district, and the community. Community members and parents wondered what would happen if after three years the approach O'Farrell is taking does not prove to be effective and how the school will respond to changes it must make to succeed. Parents stressed their concern about staff sustaining their commitment to the program and staying at the school over time. Parents also expressed concern about the emphasis on the social-emotional component of the school. Although they recognized the importance of the social service agencies having access to the school, they saw these services as crisis-oriented for the child in need. They were concerned that "normal" children might receive services that they do not need or that will not meet with the approval of parents or guardians.

Several school staff and community members noted that there was a great need to work on the marketing of O'Farrell in the community. Parents and community members need to know about the school's vision of academic excellence in a stable school environment, how it is being developed, and that the community is invited to participate. Respondents suggested that information be disseminated through the local churches and in the community and ethnic newspapers.

V. EMERGING ISSUES AND THEMES

There are several issues and concerns that have emerged during the early development of the O'Farrell Community School: Center for Advanced Academic Studies. The ideas provided below are broad themes that characterize important elements of O'Farrell's evolution through the end of June 1990. The suggestions that conclude this report are drawn from the data provided above and the issues and concerns that follow.

- **O'Farrell's planning process has taken time, patience and a tolerance for ambiguity.**

O'Farrell's development has taken place over the past eighteen months in an environment that is open to restructuring activities and school site change efforts. The planning efforts started with the charge to establish a new middle level restructuring magnet school, with shared decision making as one of its features. Those involved have needed the year and a half to define the program's focus, to involve and inform a wide variety of constituents, and to develop a common vision among these constituents. Decision making under these circumstances is dependent on individuals with different needs and perspectives, and can change as new people join the team and consensus shifts. The process is complex. It requires time and a tolerance for ambiguity as a common vision and plan for the future is formed and reformed.

Even when a plan is made in a planning process such as O'Farrell's, it is bound to go through several iterations. As this paper went to press, the team shifted the educational family structure since the enrollment for O'Farrell is now projected at 300. The new educational families will have four teachers and 100 students, with each family sharing one-third of a computer specialist's time. They also decided to have five family facilitators rather than the original three. This configuration of teachers provides students more access to certificated teachers during the daily family facilitator block. Changes like these are bound to happen and will continue to occur as the school opens its doors and continues to define itself.

- **O'Farrell's development has depended on the "buying of time" so team members could plan and work collaboratively.**

Team O'Farrell members have had time to think, reflect, discuss, debate and reach consensus collaboratively on a general direction for their school and program. They have also been able to examine other schools, visiting with and talking to colleagues who are involved in similar restructuring efforts. San Diego City Schools, along with assistance from the Stuart Foundations and the Panasonic Foundation, has provided the resources so that collaborative planning and collegial sharing and support has been possible. Much of O'Farrell's current school structure parallels several programs nationwide that the team visited over the past year. The decision making process and team spirit reflect time spent together at team meetings and retreats where dialogue was encouraged and professional relationships could develop. Teachers as professionals are not often given the opportunity to work together. Team O'Farrell has had that opportunity and taken advantage of it.

- **O'Farrell has benefitted from the interest, commitment and expertise of a wide variety of constituents.**

A diverse group of interested constituents from both inside and outside the educational community worked with the team as the plan for O'Farrell evolved. These relationships have allowed the team to work from a broader perspective than might otherwise have been possible. The superintendent, Board of Education, and School Operations Division have supported the team by providing an environment where change is encouraged. They have also attended numerous planning sessions, encouraged team decision-making, and offered assistance when needed. The district has encouraged the school to pursue its dream regardless of past tradition or precedent. The O'Farrell staff valued community participation and commitment. Parents, teachers, community members, and social service agencies have participated as members of the team and have helped shape a school program that supports O'Farrell's vision. Consultants and specialists have provided the team with outside perspectives and expertise in school restructuring and change. Team visits to other innovative schools have linked O'Farrell with the broader educational community, providing models that the team has used to develop their own school plan. O'Farrell's team concept goes beyond the school walls, and includes educators, community members, parents, consultants, and agencies committed to the school's success.

- **Team O'Farrell recognized the importance of building a strong school culture among those involved in the planning process.**

An important aspect of every O'Farrell gathering is its sense of family and team. All team members have name tags that identify them as members of the "dream team." Every meeting and retreat ends with the group in a circle for a moment of reflection and sharing. O'Farrell uses the family terminology to build membership and commitment to the team. The development of strong *esprit d'corps* is an important part of the O'Farrell way.

- **The Team O'Farrell consensus process provides the mechanism through which team members participate in decision-making and schoolwide planning.**

Team O'Farrell carefully developed its process for making all decisions by consensus. Team leaders begin the process in a large group setting by clarifying issues and identifying key concepts for all participants. This technique provides team members with the information needed to participate in the decision-making process. The small group planning sessions that follow encourage dialogue between parties that might have

conflicting views, and provide opportunities for team members to work together. Solution strategies generated by small working groups are then summarized, combined, refined, and extended in a large group setting, allowing all team members to participate in the development of the final plan. If everyone agrees with the ideas contained in the finished plan, consensus is reached. If consensus cannot be reached, the issue is tabled and the group returns to it at a later time. The consensus process assures that all team members' points of view are considered when decisions are made, and provides a structure through which conflict can be identified and resolved.

- **Even in O'Farrell's restructuring environment, leadership is desired by team members.**

Team members noted, especially in interviews, their desire for leadership from the school administrator. They want the chief educational officer to provide direction and motivation for the team and the school community. They also want the CEO, when necessary, to serve as arbitrator within the school, between the school and its community, and between the school and the central office. Although the team noted that a leader was necessary, they were careful to stress that a leader in O'Farrell's environment had to encourage leadership from within the team, understanding and respecting shared decision making and involvement by teachers, parents, community agencies, and other team members.

- **Teachers assumed greater leadership roles in O'Farrell's planning retreats as the planning process evolved.**

The teacher-as-leader role emerged over the course of the three retreats. In the first retreat, teachers were active participants while the chief educational officer played the role of visionary, facilitator, and participant. In the second planning retreat, teachers were much more involved in providing leadership and facilitating the work sessions. The CEO played a dual role as both retreat participant and co-leader (with the teachers). He also maintained his role as school visionary, offering very moving comments at the beginning and closing sessions of this retreat. Teachers completely led the third retreat, from the welcome to the traditional O'Farrell closing. The CEO was solely a team participant at this last retreat. The shift from CEO-led retreats to teacher-led retreats may have been a function of the type of issues discussed, since the first two retreats pertained to school structure and support programs while the third addressed pedagogical issues. This shift may also indicate increased teacher comfort in leadership roles and experience with shared decision making and school leadership.

- **O'Farrell's planning process revealed several issues in need of resolution and clarification.**

There were differences of opinion between Team teachers and Team parents in the planning retreat discussions on student assessment and the provision of social-emotional support for all children. During the interdisciplinary teaching and student assessment retreat, teachers expressed a desire to assess children through more authentic means such as portfolios and performance documentation. Parents saw the reasons behind this, but did not want their children to be at a disadvantage if the rest of the system still depended on traditional grades. During the social-emotional retreat the team devised a plan that involves supporting middle level children academically and socially. This support includes peer and guidance counseling, study skills, life skills such as applying for employment and maintaining checking accounts, and building self-esteem. One part of the social-emotional component is on-campus access to social service agency assistance in these areas and for more critical cases. The parents on the planning team are concerned about children who do not need crisis counseling and how they will be served by the social-emotional component of the

school. The interviews with parents and staff further illustrate this point. Faculty and staff stated that the social-emotional component of the O'Farrell plan was most important, while parents stressed access to a high-level curriculum as their priority.

The examples above had not been resolved as this paper went to press, and illustrate the importance of keeping a dialogue going among team members so that differences of opinion can be recognized and addressed. They also indicate the importance of clear communication once the school opens so parents and community members not so closely involved in the school have an understanding of the Team O'Farrell concept and the school's programs and resources.

- **Even though Team O'Farrell participated in an extensive planning process, team members are concerned about whether everything will be and remain in place once school opens.**

Team members expressed several concerns about opening the school on time. Of major concern to the team is the question of whether or not the school facility will be ready for occupancy on September 4. The readiness of the school depends on whether or not the district can meet its timelines for the O'Farrell facility. If the school is ready, team members can officially move in on August 27 having only the Labor Day weekend to get ready for school. Team members expressed another concern about continuing the same level of commitment from all parties— teachers, central office administrators, and community agencies— that they have had during the planning period. Several teachers noted a fear that the district might want to force O'Farrell into a traditional school mode once the doors open. All of these comments reflect the desire of the team to actually start the work on their "dream" with sustained support for their efforts.

What Can Be Learned About Restructuring from Team O'Farrell's Experiences?

The O'Farrell Community School: Center for Advanced Academic Studies will open on September 4, 1990, as both a new school and a restructuring school. The fact that it is new provides special benefits. The school did what most schools could not— start from scratch in building its program. Teachers and staff were hired specifically for this program and will start on September 4 sharing the same commitment and focus that most have worked on for over a year. The school has had the chance to build its own community and culture, capitalizing on each staff members' experiences in other schools. In addition, since the school is new it benefitted from financial support that new schools and magnets receive from the school district and the Federal government. Although the school will be housed in an older school facility, it will have a "face lift" over the summer with new paint, carpeting, and roofing. The school also will house state-of-the-art technology thanks to district and magnet school funding sources and contributions from the Apple Corporation. O'Farrell will start over as a new community school with the commitment and resources that teachers and principals in the public schools dream about often.

If O'Farrell is a new school, then how can any of its restructuring experiences be generalized to other public schools without similar resources? The teachers and staff at O'Farrell, all of whom have taught in more traditional school settings prior to O'Farrell, have embraced several restructuring concepts. In this regard, the school intends to serve as a laboratory for restructuring schools that may wish to implement similar aspects of the O'Farrell program. O'Farrell will not have a principal, vice principal, nor any guidance counselors. Students will be the responsibility of the teachers and will not be referred to a

counselor or vice principal or resident disciplinarian if problems arise. The curriculum will be planned in a collaborative setting with teachers from the humanities and sciences working together on common themes. Children and adults on O'Farrell's campus will work together as members of educational families, smaller units within the larger school community. Schools considering restructuring may wish to examine the planning efforts necessary to develop these school components as well as monitor O'Farrell's success with them.

In addition to school structure, Team O'Farrell uses certain processes that could be practiced at any school site regardless of available resources. Decision making is done by consensus, with all members of the faculty and staff regarded as equal contributors. Roles have shifted so that teachers are performing what are many times considered administrative functions. Community members have been active in school planning efforts and will be encouraged to participate in decisions that will shape the school. Community service agencies are welcomed as on-site partners and will work closely with Team O'Farrell members to serve students. Planning efforts have occurred for more than eighteen months involving school and central office staff, community members, and social service providers. Relationships among all of these parties have taken time to build and result in a school culture where such participation is the norm. Even with the development of a solid school culture there is a certain healthy tension among those involved in O'Farrell between process issues and school outcomes. The processes the team has designed are intended to improve the conditions of teaching and learning in order to improve student outcomes. Schools considering restructuring can benefit from O'Farrell's experiences as they consider both process and outcome issues associated with their restructuring endeavors.

Suggestions for Future Directions

As O'Farrell Community School: Center for Advanced Academic Studies continues to evolve, team members may wish to consider the following suggestions that address both process and outcome issues. These suggestions are drawn from the data and analysis provided in this report.

- Team O'Farrell, whenever possible, should clearly communicate the school's vision and its program offerings to community members and parents.
- Team O'Farrell should continue to involve colleagues and consultants from elsewhere who are involved in restructuring to assist them in on-going program planning and assessment.
- Team O'Farrell may wish to use colleagues and consultants from elsewhere to help resolve future controversial issues than can not be resolved through their consensus process.
- Team O'Farrell should use the processes already in place to respond to and meet the changing needs of the community it serves.
- Team O'Farrell should continue to use retreat settings to address new issues, revitalize the team and its mission, provide time for reflection, integrate new team members, and plan for school expansion.
- Team O'Farrell should ensure that there is a regular mechanism for communication between educational families and on-campus community service providers.

- Team O'Farrell should create a plan to assess school progress in a way that is compatible with their program.
- Team O'Farrell should consider how it will share its insights about school restructuring in other settings in the district, state, and nation.

Report prepared by Paul Goren and Karen Bachofer.